private practice software

Essential Guides

Private Practice Software Version 4

Contents

Client Details

This section includes guides to help you through adding a client record, updating, deleting and printing client details.

Creating a New Client record

From the Client Details Screen

Task Bar -> Client Details or PPS Menu -> Client -> Main Client Detail or <Alt C>

1. If you have just logged into PPS then the Client Search screen will be displayed. In either case click <New>. The Client screen is displayed with all fields empty except the Status field which defaults to 'Active'. If you have logged into PPS as a Practitioner then this field will default to your name. If the status is changed to Inactive or Deceased then this is displayed in bold letters at the top of the main client details screen.

   You can also enter the Client Registration Date. This is the date that the client registered with you (may be different to the date you are actually typing in the client details for the first time). This date can be used are part of the criteria for your reports.

2. The cursor will initially be placed in the Ref. field.

   The screen is then divided into the following sections Client Name and Address, Profile, Contacts and Notes. You can access these sections either by using the scroll bar or by clicking the tabs in the top right hand corner of the screen.

   Some of the fields have a tick box beside them. Tick this box if you wish to display that information in the Client Log.

   In some of the look up tables, for example the Occupation table, you may find occasionally that the entry you require is not in the list. In these cases you have the option to add the new entry to the list by clicking <Add> in the top right corner of the screen.

3. Name/Address

   You can enter as much or as little detail as you like. Obviously if you wish to enter into correspondence with the client then you will need to record their full address and/or e-mail address.

4. Profile

   The Profile section comprises of two standard fields, Source of Introduction and Occupation and a collection of user defined fields that you will have set up previously under Tools -> Options -> Custom Client Fields

5. Contacts

   Initially the contacts section of the Client screen shows just fields to enter doctors details. If you need to add further contacts then click <Add a Contact>. This will display a list of third-party contact types for you to choose from. Pick a contact type and a new set of contact fields will appear.

6. Notes

   The Default Notes field is used to populate the notes field for any new record added for this client.

   The Critical Notes field is used to alert the user each time this client is selected.

   The Notes field is an unlimited free text field allowing you to enter further miscellaneous details about the client.

7. When you have finished entering the details click <Save>.

From the Appointment Diary

Task Bar -> Diary or PPS Menu -> Appointments -> Appointments Diary or <Alt A>

This is useful for when a new patient is booking an appointment for the first time.

1. Double click the relevant appointment. Enter all or part of the patient surname and press <Enter>.
2. The Client Search screen is displayed showing either an empty list or list of matching patient names. As this is a new patient click <New>.
3. A small Client Details window is displayed allowing you to record contact details. Further details about the client can be entered later, using the Main Client Details screen. For example: when they arrive for their appointment.
4. When you have finished entering the details click <OK>. This will take you back to the New Appointment screen where the full name is displayed and a new client number allocated.
5. When you have finished creating the new appointment details click <OK>. The new appointment will be displayed in the diary with a '>>' next to the name to show that they are a new client.

Modifying a Client record

1. Select the client you wish to modify. (See Selecting/Searching for a Client record.)
2. Make the necessary changes and click <Save>

Deleting a Client record

1. Select the client you wish to delete. (See Selecting/Searching for a Client record.)
2. Click <Delete>. A message will be displayed explaining what types of information about the client will be deleted. Click <OK> You will then be prompted to confirm the deletion. Click <OK> to confirm or <Cancel> to cancel.

   You cannot delete a client if they have invoices raised against them and/or they have signed off clinical records.

Printing a Client record

1. Select the client whose details you wish to print. (See Selecting/Searching for a Client record.)
2. Click <Print>. You will then have the choice of previewing the details on the screen, printing them, or saving the details as a file. For example a text file or excel spreadsheet.

Selecting/Searching for a Client record

This can be done in several ways. PPS always remembers the last client you selected and will use that client in any screen until you change the client.

1. Clicking <Search> in the Client Details screen.

   The Client Search screen will be displayed. You can either enter all or part of a surname. (If it is a common surname then you can optionally enter the first initial to reduce the potential number of results.)

   You can also use other search criteria including Ref., D.O.B., Post Code, Client Number and other miscellaneous fields. The miscellaneous fields are listed by clicking the Address1 <Down Arrow>.

   One of the miscellaneous fields is telephone number. This is useful if someone left a message (where you can see the telephone number) but not their name.

   In all of the search fields, apart from D.O.B. and Client Number, you can type part of the search entry. For example searching for all clients with a particular STD code.

   When you have found the client, highlight them and click <Select>

2. Clicking Client Browse on the Task Bar to display a list of clients.

   The Client Browse screen will list all clients in your database. Within this screen you can select the order in which you wish to view the clients. For example: If you cannot find a client using the Search screen it maybe due to a misspelling of their surname. Viewing the clients in surname order will allow you to locate the client more easily.

   You can select the Client Search screen by clicking <Search>.

   You can change the order and size of the columns and the size of the Client Browse window and save your changes by clicking <Save Settings>.

   The <Auto Preview> allows you to view all the relevant details about the current client on the right-hand side of the screen.

   Once you have found the client, highlight them and click <Open>

3. Clicking the Search option on the Task Bar and then selecting the Client Screen.

   This is the same as item 1 but you are selecting the client prior to displaying the Client Details screen.

4. Highlighting the client’s appointment in the Appointments Diary and clicking the Client Details on the Task Bar.

   This is by far the quickest way of selecting a client.

Clinical Notes

This section guides you through recording clinical notes, including recording a client medical history.

Medical History

Task Bar -> Medical History or PPS Menu -> Client -> Medical History or Client Screen -> History

Creating/Updating a Medical History

1. Before creating a Medical History you will need to select the client. (See Selecting/Searching for a Client record.)
2. Now enter the answers to each question by selecting Yes, No or Not Applicable.

   You can optionally enter further notes in answer to a question using the Summary Answer field. For example: when answering 'Are you currently taking any medication?', you could answer Yes and also note what medication the client was on.

   Pressing the small <Up Arrow> button at the end of the Summary Answer enables the input field to be expanded allowing more room to enter details.

   On the assumption that you have set up your questions so that "No" is the normal answer, simply entering "N" on the keyboard will quickly take you onto the next question whereas entering "Y" will allow to enter notes against that question.
3. Review period.

   When you set up your questionnaire, you can allocate a review period to each question. The Next Review Date will be shown on those questions that you have set up a review period. To confirm that you have reviewed a question, and to move the date forward to the next review date, tick the Review box. You can also click the <Review All> button to mark all current questions as "Reviewed".
4. Click <OK> to save the Medical History.

Printing a Medical History

1. From the Medical History screen click <Print>. A preview screen will display the Medical History in print format. Click <Print> on the preview window.

   It maybe useful to print the blank form out prior for the client's first appointment and allow them to fill in the paper form as part or their client registration.

Consultations

Task Bar -> Consultation

The Consultation screen is divided into 3 sections. The top section shows information about the client, current treatment episode and other important details. The middle section of the screen is used to enter consultation notes. The bottom of the screen shows the consultation history. (The consultation history only shows fields where an entry has been made. This allows you to view your notes in a compact way.)

Creating a new Consultation

1. Before creating a Consultation you will need to select the client. (See Selecting/Searching for a Client record.)
2. If this is the first time you have entered the Consultation screen for a particular day then PPS will assume that you are entering a new consultation.

   Otherwise the previous consultation notes will be displayed. Click <Start a New Consultation> if you do wish to create a new separate consultation entry.
3. Practitioner

   A default practitioner is already entered. Either from the practitioner associated with today's appointment or if there is no appointment from the practitioner entered in the Client Details screen.
4. Standard Consultation Fields

   You can now enter details about the current consultation into the six fields shown. (These are the standard consultation fields, the headings of which, can be changed under Tools -> Options -> Clinical Notes).

   Each field, apart from General, is initially a single line. These fields automatically expand and go down to the next line as you type. Pressing <Enter> whilst still on the first line of an entry will automatically take you to the next consultation field. Pressing <Enter> on subsequent lines will expand the current field by another line.

   You can speed up your clinical notes entries using the Notes Dictionary. Right click the relevant field and select Notes Dictionary.

   You can also mark all or part of an entry as important by highlighting the relevant text, right clicking and selecting Important Information.

   You can also bring forward notes from a previous consultation (if there is one) by right clicking on any of the six notes fields. You can either bring forward notes for the current field, or for all fields.

   To save your notes Click <Save> or press <F9>
5. Custom Forms

   In addition to the Standard Consultation fields, if available, you can also use one or more Custom Forms. For example: you may wish to use a body chart to annotate.

   Click <Custom Form> and select the form you wish to use. The selected form will then be displayed in its own window on top of the main consultation screen.

   To save your notes Click <Save>. Your notes will then be displayed in the bottom half of the screen as part of your consultation history.
6. Attach Documents

   If you have any documents that are relevant to the current consultation then you can scan the document and attach it to the consultation. For example: this could be a doctors referral letter etc.

   Click <Attach Document>. Now enter the relevant practitioner, the date of the document (if not today), a heading, any notes about the document and then the path and name of the document. The easiest way to enter the path and the name of the document is to click <…> which is the browse button.

   Click <Save> to complete the attachment. Once you have saved the relating consultation a paper clip will be shown against the relevant entry in the consultation history. Click the paper clip if you wish to view, amend or delete the document.
7. Send a Letter.

   In addition to the referral and discharge letters associated with the treatment episode details you can also send further letters relating to the current consultation/treatment episode by clicking <Send a Letter>. (See Sending a Letter or E-mail)

8. Signing off a consultation.

   Click <Sign Off> and enter your login password to sign off your consultation notes so that they cannot be deleted or altered.

   Custom forms have their own <Sign Off> button.

9. Making your consultation notes private.

   Click <Private> if you do not wish anyone else to view your notes.

   The button then changes to <Public> so information can be made to other practitioners again if necessary.

   Custom forms have their own <Private> button.

10. Completing the consultation.

    Click <Consultation Complete> or press <F11> to complete a consultation.

    If this is the first consultation of a new treatment episode (or you have opted always to show this screen) the Treatment Episode Details screen will be displayed.

    Finally the Consultation Completed screen will be displayed. (See Completing a Consultation.)

11. If you are using "PhysioTools" – the exercise handout program, you can use the <PhysioTools Handout> button on the consultation screen to create/select a handout as part of this consultation. If you produce a handout, then when the consultation is saved, a PhysioTools icon appears in the consultation summary section next to the notes for this consultation. You can double-click this icon to access the handout again in future. Handouts also appear in the "documents, letters and links" summary section in the top right corner of the consultation screen.

Updating an existing Consultation

1. You can make changes to an existing consultation, provided that it hasn't been signed off, by double clicking any of the questions relating to the consultation in the consultation history section of the Consultation screen.
2. The selected consultation is then displayed in a separate window where you can make any appropriate changes. You can also choose to <sign off> and/or make the consultation <private>/<public>.
3. Click <Save> to save your changes.

Completing a Consultation

1. Click <Consultation Complete> or press <F12>. The Consultation Completed screen is displayed.

   This screen is divided into three sections dealing with treatment episode details, billing and treatment continues/completed.

2. Treatment Episode Details.

   This section allows you to review the main details of the treatment episode. If you wish to review all the details click <More…> to open the Treatment Episode screen.

3. Billing.

   You can create a charge for the client. If you had already set up a default charge for this consultation then that charge will be displayed. Otherwise select the appropriate charge.

   If this client has had a previous charge raised, the "tool tip text" (the yellow prompt that appears when you hold your mouse over the Code field) will display details of the charge previously raised for this client.

   Before creating the charge make sure that you have the correct invoicee. For example: the invoicee maybe the insurance company rather than the client.

When billing an insurance company (or other third party) you can also enter the Authorisation Code. This is the code/number given by the insurance company to pre-authorise their payment.

After entering the charge you then have the option to leave the charge to invoice later, raise an invoice now, raise the invoice and record the payment or add further charges (Cash Desk) by clicking the appropriate button.

This section also shows you the client's current balance. (See also Creating a charge from the Consultation screen.)

4. The <Note to Reception> button can be used to type in a quick note. This is handy if you are completing the consultation from your treatment room and you want the receptionist to see the note as the client returns to your reception area. This will be displayed when your receptionist selects this appointment from the Diary and "Completes" the appointment. After reading the note (and taking your comments on board!) this note is added to the general notes against the Appointment.

5. Treatment Continues or Completed.

   Treatment Continues

   If the treatment is continuing then you can update the number of further consultations required and select/change the charge code for the next consultation before clicking <Treatment Continues>.

   Treatment Completed

   You can enter the outcome and discharge status. The treatment end date will default to this final consultation date.

   If you wish to check further treatment episode details, for example: to make sure you have a discharge letter scheduled or you wish to change the treatment end date then click <More…> in section one.

   Click <Treatment Completed> to complete the treatment episode.

Treatment Episode

Creating a New Treatment Episode

A new treatment episode can only be created after an initial consultation has been created.

1. Complete the consultation by clicking <Consultation Complete> or by pressing <F12>

   The consultation details will be saved and displayed in the consultation history in the bottom half of the screen.

2. The Treatment Episode Details screen is displayed. Here you can change the practitioner responsible for the treatment, name the treatment episode, select a start date if different from today, enter a referral source and diagnosis.
3. You can also allocate a referral letter and either send it now or schedule it to be sent at a later date.
4. In the next section of the screen you can enter additional information about the treatment.
5. In the final section of the screen you can enter the number of consultations you think are required to complete the treatment episode. You can also allocate a discharge letter to schedule to be sent on completion of the treatment episode. The rest of the fields in this section can be entered once the treatment has been completed.
6. You can choose to automatically display the Treatment Episode screen (in order to make any updates) after each consultation has been completed by ticking the 'Always Show….' box in

the bottom right hand corner of the screen.

7. Click <Save> to save the new treatment episode.
8. Starting a new treatment episode will mark the client status as "Active".

Updating the details of a Treatment Episode

1. Once a treatment episode has been created for the client you can update the details later, when entering subsequent consultations, by clicking <Update>.

   You can also change the details from within the Consultation Completed screen by clicking <More…> in section 1.
2. Click <Save> to save your changes to the treatment episode.

Completing Treatment Episode

1. A treatment episode is completed by either entering details in the bottom section of the Treatment Episode screen or from within the Consultation Completed screen.
2. From the Treatment Episode screen.

   You can enter the outcome, discharge status and treatment end date.

   You can also allocate a discharge letter and either send it now or schedule it to be sent at a later date.

   Click <Save> to complete the treatment episode.
3. From the Consultation Completed screen.

   You can enter the outcome and discharge status. The treatment end date will default to this final consultation date.

   If you wish to check further treatment episode details, for example: to make sure you have a discharge letter scheduled or you wish to change the treatment end date then click <More…> in section one.

   Click <Treatment Completed> to complete the treatment episode.
4. When a treatment episode is complete, you have the option of marking the client status as "Inactive". This can be a useful indicator to use for reports, where only your "Active" clients are then the ones you are currently treating.

Printing a Consultation / Treatment Episode

Consultations can be printed in three ways either from the main consultation screen, from an individual custom form or from the Client Log.

Printing from the Consultation Screen

1. Click <Print> or press <F7>. The Print Consultation Notes screen is displayed.

   You now have the choice of printing a selected treatment episode, all treatment episodes, a single selected consultation or all consultations between a specified date range.
2. Printing a selected treatment episode.

   Click the Selected Treatment Episode prompt or radio button to print all consultation notes within the selected treatment episode. If you have more than one treatment episode for the client then you can select the treatment episode from the list.

   Printing all treatment episodes.

   Click the All Treatment Episodes prompt or radio button to print all consultation notes for all treatment episodes. (This is all the notes ever recorded for the current client.)

Selected Consultation only. (Default)

Click the Selected Consultation only prompt or radio button to print the notes, including any forms for the currently selected consultation.

All Consultations between a date range.

Click the All Consultations between a date range prompt or radio button and enter a date range to print all the consultations within that date range. (You can leave one or both date fields blank if required.

3. Options.

   Before printing you can select further printing options by clicking <Options>. Here you can choose to consultations even if no notes are recorded, print all questions from a custom form even if they have not been answered and include the record status or the notes. (Added and modified details.)

   Click <OK>. You will now see the notes that will be printed. You can either preview the notes to see how they will be printed by clicking <preview> or print the notes by clicking <print>.

Printing from a Custom Form

1. When you are creating or modifying a custom form click <print>. You will now see the notes that will be printed. You can either preview the notes to see how they will be printed by clicking <preview> or print the notes by clicking <print>.

Printing from the Client Log

1. Highlight the treatment or consultation and click <Print>. The Print Consultation Notes screen will be displayed. The use of this screen is described in the Printing from the Consultation screen section above.

Accounts

Private Practice Software allows you to manage your entire client accounting needs. You can create a range of charges that can be invoiced to a variety of selected invoicees, including the client, family doctor or GP and insurance companies. You can also manage all payments received, whether and invoice is paid immediately, or for example, a larger payment is received for a range of invoices from an insurance company at a later date. Invoices can also be part paid and several payments recorded against one invoice.

PPS uses a simple step by step way of managing all client accounts records:

CHARGES -> INVOICES -> PAYMENTS

Charges can be created from a variety of places in PPS. Once a charge has been created, an invoice can be raised for the charge (or charges), and, at the appropriate time, the payment recorded.

Invoice processing allows you to create a selection of invoices, perhaps on a weekly or monthly basis.

Creating a Charge

Charges can be created from several different areas within PPS dependant on what you are currently doing. You can create a charge on completion of a consultation or appointment. You can create a charge at anytime, provided you have selected a client, by clicking <Create a Charge> on the task bar or clicking <Cash Desk> or pressing <F11> to run Cash Desk.

Once you have created the charge you can decide leave it to invoice at a later date, invoice it now or record a payment against it that will automatically create the invoice in the background.

Creating a charge from the Consultation screen

1. Once you have completed a consultation you have the option to create a charge in section 2 of the Consultation Completed screen.

   If no default charge code exists select one, then make sure that the correct invoicee is selected.

   You then have a choice of what you want to do with the charge.

2. Create Charge, Invoice Later.

   Use this option when you want to create a charge but do not want to create an invoice or record a payment. For example: if this is a charge to an insurance company then you may want to create the charges and at the end of the month use Invoice Processing to automatically create and print out the invoices for you.

   The left hand button will disappear from the screen and a message is displayed confirming the charge you have created.

   Invoice Now, Pay Later.

   Use this option when you want to create a charge and give/send an invoice for payment if the payment is not being made at the same time.

   You will be asked if you want to print the invoice. Click <Yes> to display the Print Invoices screen where you have further print options. (See Printing an Invoice/Receipt.)

   The two left hand buttons will disappear from the screen and a message is displayed confirming the charge and invoice you have created.

   Pay Now.

   Use this option if the person you are creating the charge for wishes to pay at the same time. Clicking <Pay Now> will reveal a list of payment methods, select one by clicking on it.

You will then be asked whether you wish to print a receipt. Click <Yes> to display the Print Invoices screen where you have further print options. (See Printing an Invoice/Receipt.)

All three buttons to the left of <Cash Desk> will disappear and a message is displayed confirming that the charge and invoice has been created and a payment recorded.

Cask Desk

Use this option if you wish to add further charges. For example: if the client purchased any stock items. (See Cash Desk for further details.)

Creating a charge when Completing an Appointment.

1. Once you have completed an appointment you have the option to create a charge in section 2 of the Appointment Completed screen.

   As the methods for creating the charge are the same as the Consultation Completed screen please refer to Creating a charge from the Consultation screen (section 2) for further details.

Creating a charge from <Create a Charge> on the Task Bar

1. Click <Create a Charge>. The Client Charge window is displayed.

   If you have already selected a client previously from another screen (the Appointments Dairy, Client Details etc.) then their details will be displayed. If there is no client or you wish to change the client click <Search> to use the Client Search screen. (See Selecting/Searching for a Client record.)

2. The Practitioner and Date are already entered but you can change these.

3. Select the charge by typing in the code or clicking the Code <Down Arrow>. (You can also use the description field in the same way.) All the other details of the charge will then be shown. If necessary you can change the description, quantity, price and tax code.

4. You will then need to decide who the charge is for. For example: the client has insurance therefore the charge could go directly to the insurance company (3rd party).

   Click either the Client or Third Party radio button. Selecting the third party will reveal several new fields allowing you to select the third party. For example: the client may have more than one third party contact including their doctor, consultant, insurance company etc.

   When selecting the third party, a list of third parties currently associated with the client will be displayed. Either select one in the list or click Select Another Third-Party to display the Contact List screen to find one that isn't currently associated with the client. Once selected you will have the option of attaching the new third-party to the client's details. (If the client has no third-party contacts currently associated with them then the Contact List will be displayed.)

   If the third-party contact is not in the list then you can create a new one by clicking <New> in the Contact List screen.

5. If you wish to create the invoice at a later stage then click <OK> to save the charge otherwise click <OK – Go to Invoice / Payment>. (See Creating an Invoice.)

Creating a charge from Cash Desk

1. (See Cash Desk.)

Creating a charge from the Consultation screen

1. Once you have completed a consultation you have the option to create a charge in section 2 of the Consultation Completed screen.

   If no default charge code exists select one, then make sure that the correct invoicee is selected.

   You then have a choice of what you want to do with the charge.

Modifying a Charge

You can modify a charge in several ways depending on whether the charge has been invoiced or not.

Modifying a non-invoiced charge

1. Select the charge either from the Accounts -> Charges List, Client Log or Account screen.
2. Double click the charge or click <Modify>. The Client Charge screen is displayed allowing you to make your changes. This is the same screen as is used when creating the charge. (See Creating a charge from <Create a Charge> on the Task Bar.)
3. If you still wish to create the invoice at a later stage then click <OK> to save the charge otherwise click <OK – Go to Invoice / Payment>. (See Creating an Invoice.)

Modifying a charge that has been invoiced

1. To access the charge you wish to modify you must first select the invoice. (See Modifying an Invoice.) You will only be able to modify the charge if the Is this invoice issued box is un ticked.
2. Select the charge from the list of charges in the middle of the screen and click <Charges>.
3. Click the Modify the Selected Charge option. The Client Charge screen is displayed allowing you to make your changes.

   You cannot change the invoicee as the charge is already part of an invoice. If you wish to change the invoicee then you will need to remove the charge from the current invoice, make the changes and create a new invoice.

Removing a charge from an invoice

1. To access the charge you wish to modify you must first select the invoice. (See Modifying an Invoice.)
2. Select the charge from the list of charges in the middle of the screen and click <Charges>.

   Click Remove the Selected Charge from this Invoice. Click <Yes> to confirm.

Deleting a Charge

You can delete a charge in several ways depending on whether the charge has been invoiced or not.

Deleting a non-invoiced charge

1. Select the charge either from the Accounts -> Charges List, Client Log or Accounts -> Accounts.
2. Click <Delete> and click <Yes> to confirm the deletion.

Deleting a charge that has been invoiced

1. To access the charge you wish to delete you must first select the invoice. (See Modifying an Invoice.) You will only be able to delete the charge if the Is this invoice issued box is un ticked.
2. Select the charge from the list of charges in the middle of the screen and click <Charges>.

   Click Remove and Delete the Selected Charge from this Invoice. Click <Yes> to confirm.

Creating/Raising an Invoice

Invoices are created from charges. If the client/invoicee is paying at the time of creating the charge then PPS will automatically create the invoice. Invoices can be created from several different areas within PPS dependant on what you are currently doing. You can create an invoice on completion of a consultation or appointment, once the charge has been created. You can create an invoice at anytime, provided you have selected a client and at least one charge has been created, by clicking <Raise an Invoice> on the task bar or clicking <Cash Desk> or pressing <F11> to run Cash Desk.

Creating an invoice from the Consultation screen

1. Within the Consultation Completed screen select the charge and click either <Invoice Now, Pay Later>, <Pay Now> or <Cash Desk>.
2. Invoice Now, Pay Later.

   Use this option when you want to give/send an invoice for payment if the payment is not being made at the same time.

   You will be asked if you want to print the invoice. Click <Yes> to display the Print Invoices screen where you have further print options. (See Printing an Invoice/Receipt.)

   The two left hand buttons will disappear from the screen and a message is displayed confirming the charge and invoice you have created.

   Pay Now.

   Use this option if the person you are raising the invoice for wishes to pay at the same time. Clicking <Pay Now> will reveal a list of payment methods, select one by clicking on it.

   You will then be asked whether you wish to print a receipt. Click <Yes> to display the Print Invoices screen where you have further print options. (See Printing an Invoice/Receipt.)

   All three buttons to the left of <Cash Desk> will disappear and a message is displayed confirming that the charge and invoice has been created and a payment recorded.

   Cask Desk

   Use this option if you wish to add further charges to the same invoice. For example: if the client purchased any stock items. (See Cash Desk.)

Creating an invoice when Completing an Appointment

1. Once you have completed an appointment you have the option to create a charge and invoice in section 2 of the Appointment Completed screen.

   As the methods for creating the invoice are the same as the Consultation Completed screen please refer to Creating an Invoice from the Consultation screen (section 2) for further details.

Creating an invoice from <Raise an Invoice> on the Task Bar

1. Click <Raise an Invoice>. If there are no charges available to create the invoice then a message is displayed prompting you to create the charge first. If there are charges available then the Create Invoices from Charges window is displayed.
2. The Create Invoices from Charges screen shows you all invoices that can be created for the client. (For example, the list could include one to the insurance company and one to the client for additional sundry charges.)

   For each invoice that you select in the list, you can change the invoice address if required and confirm which charges to include on the invoice by ticking or un-ticking each entry under the Include column. These charges are listed in the bottom half of the screen. When you have selected your charges, click <Create Invoice>.

   If you have more than one potential invoice in the list you can create them all in one go by clicking <Create All Invoices>. This will create an invoice for each of the potential invoices in the top list that are selected in the Select to Include column.

3. The Issue Invoice screen is displayed. You can finalise the invoice by selecting to issue the invoice. You can add further charges to a non-issued invoice later if necessary, confirm whether the invoice is paid and print it. (See Printing an Invoice/Receipt.)

   Marking the invoice as "Issued" protects the invoice from further changes. It can, however, be un-issued later if changes are required.

   If you wish to make further changes to the invoice then click <Modify Invoice>.

Creating an invoice from Cash Desk

1. (See Cash Desk.)

Modifying an Invoice

Accounts screen, Accounts ->Invoice/Receipts List or the Client Log.

1. From any of the screens mentioned above, highlight the invoice and click <Modify> or double click the invoice to open the Invoice Details screen.

   You can only make changes to un-issued invoices. If the invoice has been issued but you are authorised to make changes then un-tick the Is this invoice issued box.

2. You can make changes to any part on the invoice including the invoice date, address and additional heading, the charge/charges that make up the invoice, payments and who the invoicee is. There is a <Refresh> button near the address that you can use if you need to reprint the invoice and the client address has changed on the main client details screen since the invoice was created.

   The one thing that you cannot change is the invoice number as this is automatically generated by PPS.

3. Modifying Charges

   You can create new charges to add to the invoice, add existing charges, modify a charge, remove a charge or delete the charge completely. Click <Charges> to access these options.

   Modifying Payments

   You can record new payments against the invoice, modify an existing payment, un-allocate a payment or delete the payment completely. Click <Payments> to access these options.

   Changing the Invoicee.

   If the invoice has already been paid then un-allocate the payment first. Click <Change Invoicee> to display the Select Invoicee screen. Here you can select either the client or a third-party. When selecting the third party, a list of third parties currently associated with the client will be displayed. Either select one in the list or click Select Another Third-Party to display the Contact List screen to find one that isn't currently associated with the client. Once selected you will have the option of attaching the new third-party to the client's details. (If the client has no third-party contacts currently associated with them then the Contact List will be displayed.) If the third-party contact is not in the list then you can create a new one by clicking <New> in the Contact List screen.

4. Once you have made your changes you can print the invoice or click <Close> to save your changes.

Deleting an Invoice

Accounts screen, Accounts ->Invoice/Receipts List or the Client Log.

1. From any of the screens mentioned above, highlight the invoice and click <Delete>.

   The Delete an Existing Invoice screen is displayed.

2. Charges

   Select whether you wish to reset the charges to not invoiced, or delete them completely by clicking the appropriate radio button.

   Payments

   Select whether you wish to un-allocate the payment, or delete the payment completely by clicking the appropriate radio button. (This option is disabled if no payments are associated with the invoice.)

3. Click <OK> to confirm the deletion.

   The invoice number cannot be used again. The Invoice/Receipts List will still show the invoice but it will be marked as ****DELETED****.

Recording a Payment

A Payment in PPS is recorded when money is received from clients or third parties. A payment must be allocated to an invoice – either immediately or in the future.

Task Bar/Accounts -> Record a Payment, Accounts screen, Accounts -> Payments List, Completing an Appointment or Completing a Consultation.

Recording a Payment from the Task Bar or Accounts -> Record a Payment, or from the Payments List

These options open the same screen, which is primarily designed to record payments that have been received at a later date. For example: posted cheques, BACS notification etc.

1. Select the account to record the payment for.

   Select a client by entering their client number or click <Search>, or select a third party, enter part of their name and click <Search for 3rd Party>.

   However, if you know the invoice number, click the Search for account via invoice No. radio button and enter the invoice number.

2. If a client or third party has been selected then an outstanding balance is displayed together with a balance for any previous unallocated payments and a total balance due.

   If an invoice number has been entered, the details about the invoice are displayed together with a balance due for this invoice.

3. Enter the payment details.

   Enter the date if different from today, select how the amount was paid and enter the payment amount. If an invoice number was previously selected then the payment amount field will already have the balance amount entered. (This can be changed if necessary)

   Optionally enter any other details about the payment. For example: a cheque number etc.

4. Click <Save>.

   If the payment is the same as the outstanding balance you will be prompted to print a receipt.

   If the payment is different to the outstanding balance the Payment Allocation screen is displayed.

5. Payment Allocation Screen

   In addition to the payment details the Payment Allocation screen also lists all the clients unpaid or part paid invoices where you can select which invoices are being paid by clicking the relevant allocate tick boxes. You will notice that the Allocated and Spare fields above the list are automatically updated.

If necessary, you can adjust the amount allocated to each invoice by typing the new amount directly into the Amount column in the list.

After allocating the payment click <Save & Print Invoice/Receipt> to print a receipt or click <Save & Close> to close the screen. (See Printing an Invoice/Receipt.)

Recording a Payment from Cash Desk

1. (See Cash Desk.)

Recording a Payment after completing an Appointment or Consultation

This option assumes that the whole amount for the appointment/consultation is being paid.

1. Click <Pay Now> to show a list of payment methods, select one by clicking on it.
   You will then be asked whether you wish to print a receipt. Click <Yes> to display the Print Invoices screen where you have further print options. (See Printing an Invoice/Receipt.)

Modifying a Payment

Accounts screen, Accounts -> Payments List or the Client Log.

1. From any of the screens mentioned above, highlight the payment and click <Modify> or double click the payment to open the Payment Allocation screen.
2. Make the appropriate changes to the payment. (See Recording a Payment)
3. Click <Save & Print Invoice/Receipt> to print a receipt or click <Save & Close> to close the screen. (See Printing an Invoice/Receipt.)

Un-allocating a Payment

Accounts screen, Accounts -> Payments List or the Client Log.

1. Simply click to un-tick the Allocate tick boxes within the Payment Allocation screen. (See Modifying a Payment)

Deleting a Payment

Accounts screen, Accounts -> Payments List or the Client Log.

1. From any of the screens mentioned above, highlight the invoice and click <Delete>.
2. Click <Yes> to confirm the deletion.

Printing an Invoice/Receipt

You can print an invoice or receipt from several screens including the Accounts -> Accounts screen, when creating or modifying an invoice, the Accounts -> Invoice/Receipts List, Invoice Processing and the Client Log.

1. When creating or modifying an invoice click <Print>, from everywhere else highlight the invoice then click <Print>. The Print Invoices screen is displayed.
2. There maybe more than one invoice shown in the list, depending on the previous screen, but the invoice you just selected will be highlighted.
3. Printing a single invoice.

   You can select who to address the invoice to, this defaults to the invoicee chosen at the time of creating the charge or charges. You can also select an invoice layout, this defaults to the one specified in the Invoice Options screen.

   Printing multiple invoices.

   If you have several invoices to print then you can select which ones you wish to print by either highlighting each one (clicking and pressing the <Ctrl> or <Shift> key at the same time) or by clicking <Select…> and choosing all, issued or not issued. You can change who the invoices are addressed to and change the layout in the same way as above.

   If you are printing several invoices to the same invoicee you can choose to print the invoices out individually or as one invoice by clicking the relevant radio button.
4. You can preview the invoice before printing by clicking <Preview>.
5. Click <Print> to print the invoice. Click <Close> to exit the screen.

Printing a Statement of Account

Accounts -> Accounts Screen or Task Bar -> Accounts

1. Select whether or not you wish to include historic transactions by clicking <History is Excluded/Included> then click <Print>. The Statement of Account screen is displayed.
2. You can select a date range if required. The "From" and "To" dates will default to earliest and latest dates in the accounts transaction list.

   You can select to record the statement print in the client log for the selected client by ticking the Record Statement Print in Client Log. (If the statement is being produced to a third party account, this option is not shown

   You can preview or print your statement, or save a copy of the Statement as an external file. (You can save to file in a number of formats including Excel and text files.)

   The printed Statement layout can be customised. (See Accounts -> Statement Layout in the Setting up PPS Guide.)

Invoice Processing

Accounts -> Invoice Processing

1. You can use the Invoice Processing screen to create all your weekly and monthly invoices. (You can specify any date range). For example: you may wish to create an end of treatment invoice that spans several months.
2. Select whether you wish to create invoices for all invoicees, just client invoices or all or a specified third-party. If there are no client charges or third-party charges available for processing then those options become unavailable.

   Some Insurance Companies prefer to have individual invoices for each Client rather than one larger invoice. You have the option to specify this by ticking or un-ticking the 'One Invoice per

Client' box.

3. Finally select whether you wish to apply a date range to the charges or process all outstanding charges and click <OK>.
4. The Create Invoices from Charges screen is displayed showing you all invoices that can be created.

   For each invoice that you select in the list, you can change the invoice address if required and confirm which charges to include on the invoice by ticking or un-ticking each entry under the Include column. These charges are listed in the bottom half of the screen. When you have selected your charges, click <Create Invoice>.

   If you have more than one potential invoice in the list you can create them all in one go by clicking <Create All Invoices>. This will create an invoice for each of the potential invoices in the top list that are selected in the Select to Include column.
5. If you have chosen to create an individual invoice then the Issue Invoice screen is displayed. You can finalise the invoice by selecting to issue the invoice. You can add further charges to a non-issued invoice later if necessary, confirm whether the invoice is paid and print it. (See Printing an Invoice/Receipt.)

   Marking the invoice as "Issued" protects the invoice from further changes. It can, however, be un-issued later if changes are required.

   If you wish to make further changes to the invoice then click <Modify Invoice>.
6. If you have processed multiple invoices or have just issued a single invoice then the Print Invoices screen is displayed. (See Printing an Invoice/Receipt.)

Cash Desk

Task Bar -> Cash Desk or <F11> or Accounts -> Cash Desk or <Cash Desk> (When completing an appointment or consultation)

PPS Cash Desk is a "point-of-sale" type screen that can be used to quickly create charges, invoices and payments all in one step.

1. If you have not already selected a client then type in their client number or click <Search> to locate the client.
2. Cash Desk will display the associated practitioner, which can be changed by clicking the Practitioner <Down Arrow>. It will also show you any outstanding invoice and un-invoiced charges balances. You can introduce these balances as part of the Cash Desk transaction by clicking <Unpaid Balances (n*)> and/or <Other Charges (n*)> that will then appear in the Cash Desk transaction list in the left hand side of the screen.

   For example: a client maybe paying for today's consultation but you notice that there is an outstanding invoice from their previous consultation. Click <Unpaid Balances (1)> and then create the new charge for today's consultation. You can then record a single payment to settle the whole amount.

   * n = The number of outstanding invoices or charges.

Creating a Charge

1. If the charge is one of your regular charges then click the appropriate charge button on the right of the screen or click <More> if that charge does not appear in the first six charge buttons. (See Accounts -> Standard Charges and Stock Items in the Setting up PPS Guide.)

   Otherwise either enter the charge code in the Enter Code field or enter * to display a full list of your charges. You can then select the relevant charge by highlighting it and clicking <Select>.

The new charge will then be displayed in the Cash Desk transaction list.

2. Quantity.

   If you wish to add more than one of the same charge item then enter the quantity in the Enter Code field, click <Quantity> and then select the charge. The quantity will be shown in the charge description.

3. Discount.

   You can apply a discount, either as a percentage discount to the previous item, to all items or apply a fixed discount amount.

   Click <Discount>, select the type of discount, enter the percentage or amount and press <Enter>

   The discount line is displayed in the Cash Desk transaction list.

4. When you have completed entering your charge or charges you can either create an invoice or record a payment.

   If the payment is going to be made at a later date click <Cash Desk Complete! Process your selected transactions…> to create the invoice and exit Cash Desk. You will be prompted to print the invoice.

   If you are recording a payment at the same time then click <Payment>.

Modifying a Charge

1. If you wish to change the description or cost of a charge double click the relevant charge in the list. The charge will be temporarily removed from the list to allow you to make your changes. Press <Enter> to return the updated charge to the list.

Recording a Payment

1. After clicking <Payment> the buttons on the left of the screen change from charge buttons to payment method buttons with the most popular ones at the top. (See Accounts -> Payment Methods in the Setting up PPS Guide.)

2. If there are funds available i.e. the client has paid in advance then the top button will show <Funds available on Account = £n>.

   Click this button to pay off the current charges using the clients available funds.

   * n = The amount of available funds.

3. To record a new payment, click the relevant <Payment Method> button. The payment method and amount is displayed on the left. The amount paid defaults to the outstanding balance.

4. You can change the payment amount and then press <Enter> to confirm the payment.

   The new payment or payment on account will be displayed in the Cash Desk transaction list.

5. Recording Change.

   If the payment is for more than the current balance Cash Desk will display the change. If they require change i.e. this is not an advance payment then un-tick the Change Held on Account box. If the client wishes to pay for consultations in advance record the full payment amount and make sure that the Change Held on Account box is ticked.

Removing Items

1. You can remove any unwanted items from the list by highlighting them and clicking <Remove>.

Resetting Cash Desk

1. You can clear Cash Desk completely by clicking <Reset>.

Recording Expenditure

Accounts -> Expenditure Management

Expenditure Management is an optional PPS module. If not purchased then the title bar will show Unregistered. It will have full functionality but restricted to a limited number of entries.

The Expenditure List

1. When you first enter the screen a list of expense entries are displayed. The screen defaults to displaying a list of expenses for all suppliers and all practitioners. Click the Supplier <Down Arrow> and/or practitioner fields to select an individual supplier/practitioner.
2. You can further filter this list ticking/un-ticking the Include paid and not paid include boxes in the top left corner of the screen. You can also select which expense types you wish to view by clicking Show List and selecting the ones you wish to include. For example: Stationary, Postage, Medical Supplies etc

Creating a new Expense Record

1. Click <New> to display the Add New Expenditure Record.
2. Supplier.

   Either select a current supplier or enter the name of the new supplier. When entering a new supplier, the List of Suppliers screen is displayed. Click <Add> to create the new supplier and enter the other details related to the supplier, a supplier id, the address, tax code, registration number and expense type.

   Once a supplier is selected, the other information relating to the supplier is displayed.
3. Date.

   The date defaults to today but can be changed.

   Practitioner.

   Select the practitioner related to the purchase.

   Location.

   Select the location if you have more than one clinic or place of work.
4. Item Details.

   Enter the code, unit cost, expense type (if different from the default), description, quantity and VAT code. The code you enter is used for subsequent purchases of the same item and works in the same way as a charge code.
5. Payment details.

   If you have not yet paid for the item then you can modify the expense record later to include the payment details.

   Otherwise enter who paid (any new payee will automatically be added to the list), the date and any other payment details. For example, a cheque number etc.
6. The notes field is available to record any further information relating to the expense.
7. Click <OK> to save the new expense record.

Modifying an existing Expense Record

1. Highlight the expense record and click <Modify> to display the Modify Expense screen.

Deleting an Expense Record

1. Highlight the expense record and click <Delete>. Click <OK> to confirm deletion.

Appointments

Appointments –> Appointments Diary or <Ctrl A> or Task Bar -> Appointments

The PPS Appointments Diary allows you to record all your client appointments, and manage your available appointment times. There are a variety of diary view styles to suit your needs including single day, whole week, single or multiple users.

Creating an Appointment

1. Highlight the appointment. Either right click to display a list of options and select New Appointment, press <F2> or click <New> on the Appointment Diary Tool Bar to open the New Appointment Details screen.
2. You will notice that many of the details about the appointment are already entered. For example: the date, time, practitioner, duration of the appointment and optionally the appointment type, the location and/or treatment room. You can change these details if for example you wish to allocate more time to a particular client.
3. Select the client by either entering all or part of their surname, entering their client number or clicking <Search>.

   Entering all or part of the client's surname shows a list of clients that match that surname. You can further refine the surname search by adding <space> and their initial after surname.
4. If the client does not appear on the list then click <New> to create a new client record. (See Client Details -> Creating a new client -> From the Appointment Diary.)
5. If you know the reason why the client is having the appointment you can optionally select an appointment type.
6. Enter any other relevant information about the appointment in the notes field and click <OK> to create the appointment. PPS will prompt you if there are any outstanding activities or future appointments already booked for this client.
7. If you have a dedicated label printer such as the DYMO LabelWriter, you can set up PPS to prompt you to print an appointment details label. This prompt will appear while you are saving the appointment (in point 6 above).

   In order for this prompt to appear you must have firstly selected the Label Printer and style of Labels using the PPS Menu Tools->Options. You must also switch on this option in your Appointments Diary Settings using the PPS Menu Tools->Appointments Diary Options – select the Reminders tab and select "Prompt to Print Label".
8. You can also configure (using Tools->Appointments Diary Options) a reminder to be automatically scheduled *x* days before the appointment, if this appointment is more than days before the appointment, if this appointment is more than *y days, weeks, months or years* in the future. The reminder is a PPS Activity record and can be a Telephone Call, Letter, E-Mail or SMS Message. You will be prompted to process this reminder when it becomes due *x* days before the appointment.

Repeat Appointments

1. If a client wishes to book several appointments for example: every Monday at 10:00 am then click <Repeat> to open the Repeat Appointments screen before clicking <OK> to save.
2. The box to the lower right indicates your current selection and is updated each time you change the selection in one of the other fields.

You can repeat an appointment on either a daily, weekly, monthly or yearly basis. You can also specify that the appointment be repeated on the same day each month.

3. Specify the frequency. For example: every third week, or every six months etc.
4. Specify the nominated day. This changes depending upon the selection in the first field. For example: selecting weekly then the options are the days of the week. Selecting monthly then the options are the days in the month.

   This field is not used with Daily and Yearly intervals.
5. If the repeat appointment falls at the weekend, you can then select to: Leave Alone (make the appointment anyway), Move to Friday, Move to Monday, Move to Nearest Day (Friday if it falls on Saturday and Monday if it falls on Sunday), or Don't make the appointment.
6. Finally select the duration, number of appointments to repeat either using a date range or number of elapsed days, weeks, months or years.
7. Click <OK> to save your selection.

   The repeat appointments are only made when you save the original appointment. If you cancel and do not save the appointment details, then the repeat appointments are not made.
8. Click <OK> to save the original appointment. A message is displayed confirming the repeat bookings. It will also show how many appointments could not be booked due to conflicts.

Modifying an Appointment

1. Highlight the appointment. Either right click to display a list of options and select Modify Appointment, press <F3> or click <Modify> on the Appointment Diary Tool Bar to open the Modify Appointment Details screen.
2. This will display a pop-up menu of options. These options will include the opportunity to "Complete" the appointment, "Modify" the appointment, or to print an appointment details label (if you have set up a dedicated label printer – see Creating an appointment for more details.)
3. Select the Modify button, change the appointment details in the same way as creating one. (See Creating an Appointment.)

Moving an Appointment

If you just want to change the time of the appointment then you can move it without having to open the appointment.

1. In Diary List Style

   Highlight the appointment and right click to display a list of options. Select Cut Appointment.
2. Then highlight the new appointment slot, right click. Select Paste Appointment.

   You can also use <Ctrl X> and <Ctrl V> to do the same thing.

1. In Dairy Display Style

   You can do the same as above but if the new appointment slot is visible on the same page you can drag and drop the appointment.

Copying an Appointment

If you want to repeat appointments randomly, i.e. not at the same time each day or week etc. you can copy appointments in a similar way to moving them.

1. Highlight the appointment and right click to display a list of options. Select Copy Appointment.
2. Then highlight the new appointment slot, right click. Select Paste Appointment. Repeat the stage for each new appointment.

Deleting an Appointment

1. Highlight the appointment. Either right click to display a list of options and select Delete, press <F4> or click <Delete> on the Appointment Diary Tool Bar. Click <OK> to confirm the deletion. PPS will prompt you if there are any outstanding activities for this client.
2. If the appointment is part of a set of repeat appointments then you will be asked if you wish to delete the future appointments in the set.

Cancelling an Appointment

1. Highlight the appointment and either click the red DNA tick button or right click and select DNA to open the Client Did Not Attend screen.
2. Enter any information about the cancellation in the Notes field.
3. Select the reason for non-attendance by clicking Why <Down Arrow>. (These entries are set up in Tools -> Look Up Tables -> Appointment Diary Tables -> Reason for Non Attendance.)
4. Depending on the type of cancellation the appointment can be re-opened and/or a charge raised.
5. If you have Re-opened the appointment slot, the "Holding List" is checked for any suitable clients that could fill this slot.

Completing an Appointment

1. Highlight the appointment and either click the purple appointment completed tick button or right click and select appointment completed to open the Appointment Completed screen. You can also double-click on the appointment and select "Complete" from the pop-up menu.
2. From here you can bill the client and record payments. (See Creating a charge from the Consultation screen.)
3. If you wish to make another appointment enter when the next appointment should be and click <Book Another Appointment>. The Appointment Completed screen will close and the appointment diary will jump to the relevant day/week.
4. If you don't want to book the appointment then you can schedule a reminder. Choose when the reminder should be and click <Schedule a Reminder> to open the Schedule a Future Reminder screen. (See Activities -> Schedule a Reminder.)

Blocking out an Appointment Slot

An appointment slot can be blocked out in order to make it unavailable for booking. This can occur when a slot is not available on a certain day. This can be useful for practice meetings, training sessions etc.

Creating a Blocked Appointment

1. Highlight the appointment. Either right click to display a list of options and select Add Blocked Appointment or click <Block> on the Appointment Diary Tool Bar to open the Block Appointment screen.
2. Change the duration if you wish to block out several appointments.
3. Select the reason for non-availability. (These are set up in Tools -> Look Up Tables -> Appointments Diary Tables -> Non-Availability Reasons.)
4. Enter any relevant notes relating to the blocked out appointment.
5. You can repeat the blocked appointment by clicking <Repeat> and selecting the options in the same way as repeating an appointment. (See Repeat Appointments.)
6. Click <OK> to save the original blocked appointment. A message is displayed confirming the repeat bookings. It will also show how many appointments could not be blocked due to conflicts.

Modifying a Blocked Appointment

1. Highlight the blocked appointment. Either right click to display a list of options and select Modify Appointment, press <F3> or click <Modify> on the Appointment Diary Tool Bar to open the Modify Appointment Details screen.
2. Modify the blocked appointment details in the same way as creating one.

Diary Events

Diary events are like appointments but can hold details of more than one client. This can be used for training courses or group sessions.

Creating a Diary Event

1. Highlight the appointment. Either right click to display a list of options and select Add Event or click <Event> on the Appointment Diary Tool Bar to open the Diary Event screen.
2. Enter the name of the event. This is what is displayed in the diary.
3. Enter the type of event. (These are set up in Tools -> Look Up Tables -> Appointments Diary Tables -> Diary Event Types.)
4. Enter or change the diary user responsible for the event and optionally enter or change the Location and Room.
5. Change the event date, time and duration if necessary.
6. Select the client responsible for the event and not one of the attendees. This client can be used for billing purposes if required.
7. Enter any relevant notes relating to the event.
8. Enter the maximum and minimum number of attendees required for the event.

9. You can then enter the list of attendees. You can either select from you existing clients, or simply by typing in a name. Press the Add to List button to add the selected attendee to the list.

   To add further attendees at a later stage simply modify the diary event.

10. Click <OK> to save the diary event.

Modifying a Diary Event

1. Highlight the blocked appointment. Either right click to display a list of options and select Modify Appointment, press <F3> or click <Modify> on the Appointment Diary Tool Bar to open the Modify Appointment Details screen.
2. Modify the diary event details in the same way as creating one.

Managing the Holding List

The holding list is used to record clients waiting for an appointment.

If there are clients on the Holding List, a small yellow button is displayed next to the appointment status ticks indicating the number of clients on the Holding List.

1. Either right click and select Client Holding List or click <Holding> on the Appointments Diary Tool Bar to open the Clients Holding screen.
2. You can filter the items viewed in the list, i.e. all or a selected diary user by clicking the Show List for <Down Arrow>.

   You can further filter the list to show all reasons for holding or a selected one by clicking the Clients Holding for <Down Arrow>.
3. You can show more details about each client by clicking >> in the bottom right corner. You can subsequently shrink the details by clicking the same button.

Adding a client to the Holding List.

1. Click <Add> to open the client selection screen. If an existing client then enter their surname and click <Search> or enter their client number to retrieve their details. If a new client (i.e. not on the database) then type their full name in the Client Name field.
2. Enter a contact number for the new client.
3. If the client is holding for as specific appointment then select the appointment from the Client Holding For list. (These are set up in Tools -> Look Up Tables -> Appointments Diary Tables -> Slot Descriptions.)
4. Select a diary user if the client has a preference.
5. Select whether they are holding for an Urgent Appointment/Cancellation, Next Available or Anytime.
6. Enter any other relevant information in the notes field and click <OK> to create the entry. The client has been added to the Holding List.

Modifying a client in the Holding List.

1. Highlight the entry in the Holding List and click <Modify>.
2. Update the details in the same way as creating them and click <OK> to save the details.

Deleting a client from the Holding List.

1. Highlight the entry in the Holding List and click <Delete>. Click <OK> to confirm the deletion.

Creating an appointment for the client from the Holding List.

1. When an appointment is cancelled/deleted and you have clients on the holding list that could use the appointment, a message will be displayed prompting you to the fact.
2. Either click <Holding> or double click the yellow <n Holding>.
   * n = The number of clients on the Holding List.
3. Highlight the client in the Holding List and drag them to the relevant appointment.
4. Click <OK> to confirm the new appointment.

Printing the Appointment Diary

1. Click <Print> to open the Print Appointments Diary screen. From here you can either print the diary or print an appointment schedule for a client by clicking the appropriate Tab at the top of the screen.

Diary Print

1. Select whether to print the diary by diary user or by location. Then select a specific diary user or location or leave blank to print all.
2. Choose what information you wish to include for printing by clicking the appropriate tick boxes.
3. Enter a date range and select to print the diary based on a 5, 6 or 7 day week. Alternatively you can select from one of the "popular date selections" for example "This Week". This enters the From and To date for you.
4. Select the print style. How many columns, portrait or landscape or a Month per page.
5. Select All Diary Users for Each Day to print your diary users in turn for each day or select All days for each Diary User to print the whole selected date range for each Diary User.
6. Choose whether to print just the booked appointments or all appointments.
7. Finally you can enter your own heading for the report.
8. When you have finished making your print selections you can preview the report, print it or export the information to an external file. For example: a text file, spreadsheet etc.

Appointment Schedule

1. Select the client by entering their surname and clicking <Search> or entering their client number.
2. Select which appointments you wish to print: All Future, All Past, All or Between Selected Dates. You can also choose include DNA appointments.
3. You can send the appointment list to the client by letter or e-mail by clicking <Letter/Email>. (See Activities -> Sending a Letter or Email)
4. Finally you can enter your own heading for the report.
5. When you have finished making your print selections you can preview the report, print it or export the information to an external file. For example: a text file, spreadsheet etc.

The Daily Appointments List

Appointments –> Daily Appointments List or <Ctrl L> or Task Bar -> Daily List

The Daily Appointments List is a useful way of viewing all of today's appointments (or appointments for a selected day) in a simple list. The list includes all of the basic appointment details (date, time, duration, client, etc.) as well as an indication of the appointment status (arrived, being seen, completed, DNA). In addition, you can also see if the appointment has been billed, and if clinical notes have been recorded.

1. To change the date either enter a new date in the Date field or select the date from the calendar on the Task Bar.
2. You can view all practitioners or single practitioner by clicking Practitioner <Down Arrow> and selecting the appropriate option.

Activities

Activities or Task Bar -> Activities

Activities allow you to keep track of various client activities that are not covered by other PPS features such as clinical note taking and accounting functions.

Activities include sending letters or e-mails, sending internal messages, preparing address labels, client contacts, telephone calls and personal actions.

You can view your activities either in the Activity List or Task List.

The Activity List

Activities -> Activities List or Task Bar -> Activities

1. You can view activities for either a single practitioner or for all practitioners by clicking the Activities For… <Down Arrow> and selecting the appropriate entry.
2. You can choose to view any combination of activities that are due, Future or Completed activities by clicking the appropriate Include… tick boxes.
3. You can then select which activity types you wish to view by clicking the relevant activity type tick boxes.

Creating a new activity.

1. Click <New> to display a list of activity types and select the appropriate entry.
2. Depending on what you have selected a screen will be displayed allowing you to enter the details of that activity. (See the individual activity types later in this section)

Processing (changing or completing) an activity.

1. Highlight the activity in the list and click <Process>.
2. Depending on what you have selected a screen will be displayed allowing you to change the details of that activity or complete it. (See the individual activity types later in this section)

Deleting an activity.

1. Highlight the activity in the list and click <Delete>. Click <Yes> to confirm the deletion.

Printing the activity list.

The Activities List is printed from the Reports option. (See Reports -> Activities Reports)

The Task List

Activities -> Task List or <Alt +F12>

The PPS Task List is your own "To Do" list. It contains activities that are due today (or overdue). And optionally shows today's activities that you have completed.

When you create an activity (this applies to all activity types), you have the option to include the activity in the task list. Make sure that this box is ticked for the activity to appear on your task list.

1. The Task List displays activities that are only applicable to you.
2. You can create new personal actions by double clicking the top of the screen: Double-Click Here to add a new task. (See Creating a Personal Action)
3. You can complete an activity simply by clicking the appropriate tick box under the tick column.
4. Activities cannot be deleted from the Task List. (See Activities List)

Sending a Letter

Activities -> Send a Letter or Task Bar -> Send a Letter or Activities -> Activities List

1. Select the person responsible for the letter by clicking <Down Arrow> and selecting the relevant entry.
2. If the letter is going to be sent at a later date, select the Due Date and Time. Alternatively you can click <Due In …> next to the time and specify a time period. For example: 1 week, 3 months etc. Your selection here will update the Due Date and Time.
3. Optionally select a practitioner associated with the letter.
4. Select who the letter is for. You can select a client in the normal way or select a third party by clicking the radio button and entering the name of the third party in much the same way as selecting the client. You can also select that the letter is not going to either a client or third party. Any contact telephone numbers relating to the client or third party will be displayed.
5. Enter the subject of the letter. If left blank it will use the name of the selected letter. This subject will show in the Activities List, Task List and Client Log.
6. If you are going to use a standard letter template click the Std. Letter <down arrow>. Select the appropriate letter from the list.

   This list has two columns. The first column shows the name of the letter template and the second column show the name of the document if a Word document.

   If you don't wish to use a letter template, leave blank.
7. Enter any other relevant information about the letter to be sent in the Notes field.
8. Choose to include the activity in the Task List and/or when printing out the diary.
9. Although you can manually enter an Outcome and Completed details, these are entered automatically when sending the letter.
10. Click <Send> to open the Letter Editor screen or Word dependant on the letter template chosen.

    PPS Letter Template

    The contents of the letter are displayed. Before printing the letter you can change the text and also introduce further merge fields by clicking <Fields>. Click <Print> to print the letter.

    Word Letter Template

    Word is opened showing the contents of the letter ready to be modified if necessary and printed.
11. Click <Yes> to confirm that the letter has been completed (printed).
12. The letter template may have a follow up activity associated with it. (See Setting Up PPS -> Standard Letters.) Click <Yes> to create the follow up activity.

13. Finally click <Close>.

Sending an E-mail

Activities -> Send an E-Mail or Task Bar -> Send an Email or Activities -> Activities List

1. This works in the same way as sending a letter. (See Sending a Letter)
2. When selecting an optional letter template you will only have access to PPS letter templates.
3. Click <Send> to create the e-mail. The e-mail is sent directly to your Outlook Outbox.

Sending a Message

Activities -> Send a Message or Task Bar -> Send a Message or Activities -> Activities List

1. Select who the message is for by clicking the To <Down Arrow> and selecting either an individual or all.
2. Decide whether to include yourself as a recipient.
3. Enter the subject of the message. This subject will show in the Activities List, Task List and Client Log.
4. Type the message.
5. Optionally select a client and click <Send>

Preparing a Label

Activities -> Prepare a Label or Activities -> Activities List

Labels can be printed either to an A4 sheet, or to a dedicated label printer such as the DYMO LabelWriter.

For A4 labels, Private Practice Software uses Avery L7162 or equivalent Address Label sheets containing 2 x 8 labels.

For the DYMO LabelWriter, Private Practice Software can use the following label sizes: 99012, 30252 & 30374

1. Select the person responsible for the label by clicking <Down Arrow> and selecting the relevant entry.
2. If the label is going to be prepared at a later date, select the Due Date and Time. Alternatively you can click <Due In …> next to the time and specify a time period. For example: 1 week, 3 months etc. Your selection here will update the Due Date and Time.
3. Optionally select a practitioner associated with the label.
4. Select who the label is for. You can select a client in the normal way or select a third party by clicking the radio button and entering the name of the third party in much the same way as selecting the client.

   If you selected a client the client address will be displayed. In addition there are other client related labels that can be printed such as a Client Record reference label and Client

Appointment Details. You can also select to print labels for any associated third-party addresses. For example: Insurance Company, Doctor etc. Click the relevant entry on the left of the label to show the address details.

You can update the address/label contents if necessary by typing in the Label entry on the screen.

You can also select that the label is not a client or third party to allow you to enter you own details to print on the label.

5. Enter the subject of the label. This subject will show in the Activities List, Task List and Client Log.
6. Enter any other relevant information about the label in the Notes field.
7. Choose to include the activity in the Task List and/or when printing out the diary.
8. Although you can manually enter an Outcome and Completed details, these are entered automatically when completing the label.
9. To print to a Dedicated Label Printer, Click <Print – Label Printer> The label will be printed immediately to the label printer. You must have set up your label printer, and style of labels using the PPS Menu Tools->Options.

   To print to an A4 sheet, click <Print> to open the Label Print Selection screen where you have the choice of either printing the single label now or spooling it to print later.

   Print Single Label Now

   Double click the relevant label position. The address will appear on the label. Click <Print>

   Spool To Print Later

   Double click the relevant label position. The address will be added to the label sheet. Click <Print> when you have added all the labels you require. You can also print the label spool later: Activities -> Label Print Spool.

Creating a Personal Action

Activities -> New Personal Action or Activities -> Activities List

1. Select the person responsible for the action by clicking <Down Arrow> and selecting the relevant entry.
2. If the action is going to be taken at a later date, select the Due Date and Time. Alternatively you can click <Due In …> next to the time and specify a time period. For example: 1 week, 3 months etc. Your selection here will update the Due Date and Time.
3. Optionally select a practitioner associated with the action.
4. Optionally select who the action is for. You can select a client in the normal way or select a third party by clicking the radio button and entering the name of the third party in much the same way as selecting the client. You can also select that the letter is not going to either a client or third party. Any contact telephone numbers relating to the client or third party will be displayed.

   If this is a non client related action then highlight the client number and press <Delete>.
5. Enter the subject of the action. This subject will show in the Activities List, Task List and Client Log.
6. Enter any other relevant information about the action in the Notes field.
7. Choose to include the activity in the Task List and/or when printing out the diary.
8. Although you can manually enter an Outcome and Completed details, these are entered automatically when completing the action.

13. Finally click <Ok>.

Setting up an SMS Message Account

Tools -> Set Up SMS Message Account

1. You must be logged into the "Live" database in order to set up your account. You cannot send SMS Text Messages from PPS whilst logged into the "Demo" database.
2. Do NOT set up your own account with the SMS provider – use this menu option in PPS to set up your account.
3. **Account ID** – this is determined for you. It is "pps" plus your PPS Registration No. Once your account is set up, use this to log onto the Boom-SMS web site to top up your credits.
4. **Password** – Enter your own chosen password. You will need this when logging onto the Boom-SMS web site to top up your credits.
5. **E-Mail address** – This is used for Boom-SMS to contact you if there are any problems sending a message, and to inform you when your account credit is low. Boom-SMS do not use this e-mail address for any other purpose and do not distribute this e-mail address to anyone else. Please make sure if you use Spam protection on your email, that e-mails from Boom-SMS are allowed through, as they are automatically generated e-mails
6. Enter the remainder of your contact details. These are held on your account with Boom-SMS
7. **SMS Message ID** - Enter the SMS message ID. This is who the recipient of the message sees that the message is from. **It is not possible for the recipient to reply to SMS messages sent from PPS.** This entry can be up to 11 characters or numbers. If possible, use an entry that your clients will recognise as being your clinic, as this is the first thing your client will see when they receive the message.
8. **Dialling prefix from the UK**. Use this if you are outside the UK. Enter your country dialling code in the form of +44 (where 44 is your international dialling code). If you are in the UK, you can optionally still enter +44 here – it makes no difference to sending SMS messages from the UK.
9. Select if you want to send SMS messages vai e-mail or Direct Posting.

   Send Via E-mail means that PPS will create a message and place it in the Outbox of your normal desktop email system. You must have a desktop email system working (Outlook/ Outlook Express) in order to send SMS messages this way.

   Send Via Direct Posting means that your SMS message will be "posted" directly to Boom-SMS. You Must have a permanent internet connection (broadband) or be connected to the internet before sending a message this way. If you are not connected to the internet, the message will not be sent.
10. Click the button to create your account. This will give confirmation that your account has been created. Again - **You must be connected to the internet to create your account.**
11. A message will be displayed indicating that your account has been set up. Once your account is set up, you can click onto the Boom-SMS web site, log into your account (using your details in steps 1 and 2 above) and pay to top up your credits.

    You will receive 10 free credits on your account, so you can start sending SMS Messages straight away, and top up your account later!

Sending an SMS Message

Activities -> New SMS Text Message

1. This works in the same way as sending a letter. (See Sending a Letter)
2. You can select an optional SMS Message template – these are set up on the PPS Tools menu.
3. Confirm how you want to send the message – this is taken from your SMS Account settings on the Tools menu. If you send via "direct post" you must be connected to the internet. Sending via e-mail places to text message in your Outlook e-mail Outbox.
4. Click <Send SMS> to send the message. You will receive an e-mail to the e-mail address on your SMS Account confirming that the message has been sent.

Reports

PPS includes many different reports that you can run presenting information accumulated from various parts of the system. There are two main reports options: PPS Reports and Mail Merge, and Summaries and Statistics.

PPS Reports and Mail Merge

Reports -> PPS Reports and Mail Merge

PPS Reports are broken down into six categories: Client, Activities, Accounts, Clinical Notes, Appointments and Favourites.

The Mail Merge function as available as an output option once you have run the report. (See Mail Merge)

Beside each of the sections there is a <Run> and <Open> button. <Run> displays a screen allowing you to select just a date range for the selected report for quick operation. <Open> opens the report wizard guiding you through the other parameters that can be applied.

Selecting the Run option

1. Highlight the report and click <Run>.
2. The Select Date Range Screen is displayed. Either choose one of the popular date selections by clicking the relevant radio button or click None – Enter Dates to enter you own date range.

   In each date field you can either enter the full date or click <Down Arrow> to display the calendar.
3. Click <OK> to run the report.
4. The Report Output Screen is displayed. (See Report Output)

Selecting the Open option

All the report wizards work in a similar way so the steps described below are based on the following example:

Produce a list of patients, who's client status is active, are associated with the a particular practitioner, who have not had an appointment in the last six months.

1. Highlight the Client List report and click <Open>.

   You can navigate between the different sections of the report wizard by clicking the tab sections at the top of the screen or clicking <Back> or <Next>.
2. Select.

   Select the practitioner by clicking the Selected Practitioner <Down Arrow> clicking the relevant entry.

   Click the Last Ever Occurrence Only radio button. (As we are just interested in the last time a client had their appointment.)

3. Date Range.

   Click <Date Range> to go to the next section.

   Click the None – Enter Dates. If there is a date in the Date From field, highlighting the date and press <Delete>. Enter a date equivalent to six months ago into the Date To field. (This will restrict the number of clients to only the ones that last attended up to six months ago.)

4. Include.

   For this particular example, if you were going to telephone each client then make sure the Contact Numbers tick box is ticked to include the clients telephone number in the report.

5. Breakdown.

   Although for this example there is no need to breakdown the information it could be useful to print the list of clients in name order. Click the Break down results firstly by <Down Arrow> and select Client (Surname/Firstname/No).

6. Criteria.

   Optionally type a heading for the report.

   To limit the patients to just the active ones, click the Field <Down Arrow> and select Client Status. Then if not already displayed, click the Condition <Down Arrow> and select Active.

7. Click <Finish> to run the report and open the Report Output screen. (See Report Output.)

   PPS will prompt you if no matches are found, i.e. the report is empty.

Report Output

Each time you run a report, you are presented with a selection of Output Options: Print, Preview, Mail Merge, To File and Close.

You also have the choice to print/view the report either with full detail or in summary mode.

Preview

1. Click <Preview> to view the report on the screen.
2. Press <Esc> to return to the Report Output screen.

Print

1. Click <Print> to print the report. The standard windows print screen is displayed allowing you to select a different printer and print options if necessary.

Mail Merge

1. (See Mail Merge.)

To File

1. Select the file format for the report results to by clicking <Down Arrow> and selecting the file type.

   With some of the field types you can choose to include/exclude the field names.

2. Click <OK> to open the file save screen.

   The default folder for saving the file is OUTPUT that is under the main PPSv4.0 folder. You can change the folder by clicking the Save in: <Down Arrow>.

   Enter the name of the file you wish to save in the Select an Output field.

   Click <Save> to create the file.

A message will be displayed confirming that the file has been created.

3. Click <OK> to return to the Report Output screen.

My Favourite Reports

PPS offers a wide variety of reports for which you can select a broad range of selections, criteria and breakdown options. You have the option of adding any report, including your selections, criteria and breakdown options to a list of Favourites.

1. For any report, once you have specified the report parameters within the report wizard press <Add to Favourites>.
2. In the Report Favourites screen, enter your report name. This is the name that will appear in the list of My Favourite Reports.
3. Optionally enter any help text associated with the report that may be useful to other users running the report.
4. Enter an order number to define the position of the report in the list of My Favourite Reports.
5. Click <OK> to save the new report. The new report will appear in the list the next time you open the PPS Reports screen.
6. You can change the details of a favourite report by clicking <Edit> next to the My Favourite Reports list to open the Report Favourites screen.
7. You can also Delete one of your favourite reports using the <Delete> button.

Mail Merge

A mail merge is when you want to send a standard letter to a selection, or all your clients in one go.

1. Your report may contain more than one line per client. Click the One Line per Client radio button if you do not wish to send duplicate letters to the same client.
2. You can also exclude Client that have been marked as deceased by clicking the Client Status tick box if not already ticked.
3. You now have several options on how you wish to produce the mail merge.

Letters & E-Mail

1. Click <Letters & E-Mail>. PPS will confirm how many clients have been selected for the mail merge.
2. Click <OK> to open the Letter Editor.

   On the left of the screen a list of selected clients is displayed. You can exclude clients in the list by clicking the relevant include tick box.

   (See Sending a Letter).

File

1. Click <File>. PPS will confirm how many clients have been selected for the mail merge.
2. Select the file format for the mail merge by clicking <Down Arrow> and selecting the file type.

   With some of the field types you can choose to include/exclude the field names.

3. Click <OK> to open the file save screen.

   The default folder for saving the file is OUTPUT that is under the main PPSv4.0 folder. You can change the folder by clicking the Save in: <Down Arrow>.

   Enter the name of the file you wish to save in the Select an Output field.

   Click <Save> to create the file.

   A message will be displayed confirming that the file has been created.

4. Click <OK> to return to the Mail Merge Output screen.

Labels

1. Click <Labels>. PPS will confirm how many clients have been selected for the mail merge.
2. If you wish to enter the labels into each client's contact history click <Yes> otherwise click <No>.
3. The Label Print Selection screen is displayed.

   You can view the individual labels by clicking the navigation buttons just above the label text.

   You can make changes to individual labels by editing the label box.

4. Click <Preview> if you wish to view the label sheets before printing.
5. Click <Print> to print the labels.

Statistics and Summaries

Reports -> Statistics and Summaries

This option is dependant upon you having MS Graph installed – MS Graph is supplied as part of Microsoft Excel (and some other Microsoft packages).

Creating/Modifying a Chart

The steps described below are based on the following example:

Produce a graph of new and existing clients, broken down into male and female, for a particular practitioner for the last month.

1. Click <New> or start entering your selections and confirm that you wish to save this as a new chart on completion.
2. Step 1

   Select Client and New Clients by clicking the appropriate tick boxes.

3. Step 2

   Click <Down Arrow> to display a list of breakdowns and select Sex.

   Optionally click to include blank entries. This will include all clients where their sex has not been entered.

4. Step 3

   Click the Category <Down Arrow> and select Practitioner.

   Click the Which One <Down Arrow> and select the relevant practitioner.

5. Step 4

   Click the Last Month radio button.

6. Click <Re-Calculate> to generate the chart. Confirm whether you wish to update the current chart with your new selection or add it as a new chart.

Click <Yes> to overwrite the current chart. Click <No> to create a new one.

Viewing the Charts

1. The charts are displayed on the right-hand side of the screen.

   Like most of the screens in PPS you can maximise the Charts screen.
2. To view other charts click the navigation buttons (< , >).

Changing how the chart is displayed

1. If you have Excel installed then you can double click the chart to change the characteristics. For example: changing the type of graph etc.

   You can also copy and paste the chart into Excel using either the Copy and Paste options under Edit on the PPS menu, or use <Ctrl C> and <Ctrl V>.

Deleting a Chart

1. Select the chart you wish to delete using the navigation buttons in the bottom right hand corner of the screen and click <Delete>. Click <OK> to confirm the deletion.

Printing the Charts

1. Click <Print> to preview and then optionally print all the charts. If you wish to print a single chart then copy and paste it into Excel first.

PPS Custom Forms

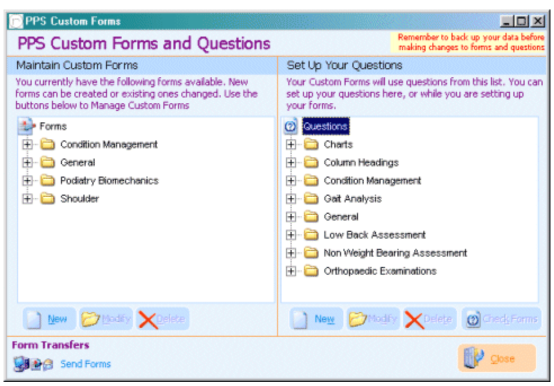
Custom Forms is part of PPS Clinical Notes. You can design, create and use forms to collect information about your clients. All forms are accessed from the Consultation screen. Typical examples for use of forms are: Clinical notes records, clinical diagnosis and outcome forms, medical or case histories, test and measurement results, questionnaires, and many more.

PPS Custom Forms is either in "Registered" mode or "Unregistered" mode. If you have purchased the full version of PPS that includes clinical notes, then this is the "Registered" mode; you will be able to design new forms and make changes to existing forms. If you have not purchased the full version of PPS with clinical notes, then Custom Forms will not be registered and will be the evaluation version only. This means that you can complete 5 forms only as part of your clinical notes.

If you want to upgrade your PPS to the full clinical notes version, then please contact your PPS supplier

Custom Forms Maintenance

The Forms Maintenance screen is used to add new forms, change existing forms, add new questions and change existing questions. The Forms Maintenance screen is accessed from the PPS Tools Menu -> Custom Forms Maintenance option



The left-hand side of this screen shows your existing forms, listed in the categories they are filed in. Clicking on the + symbol or double clicking the category name will display the list of available forms within that category. The buttons at the bottom of this list enable you to add new forms, modify existing forms, and delete forms.

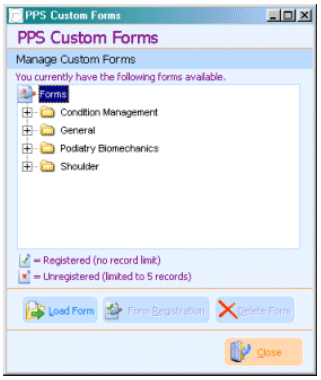
NOTE: If you select to delete a form, PPS first checks to make sure that the form can be deleted (you must have the correct authorisation to delete forms from your system administrator) and that no other users (on your network) are using the form. If a form has been completed and "signed off" for any client, the form cannot be deleted. If the form can be deleted and you confirm that you want to delete the form, then ***ALL RECORDS THAT YOU HAVE ADDED USING THIS FORM WILL ALSO BE DELETED - PERMANENTLY.***

The right-hand side of this screen shows your existing questions, listed in their relevant categories. Clicking on the + symbol or double clicking the category name will display the list of available forms within that category. The buttons at the bottom of this list enable you to add new questions, modify existing questions, and delete questions.

*NOTE: If you select to delete a question, PPS first checks to see which forms the question is used on, whether you are allowed to change this form, and that no other users (on your network) are using the form. If the question can be deleted and you confirm that you want to delete the question, then **ALL FORMS THAT USE THIS QUESTION WILL BE CHANGED - ENTRIES THAT YOU HAVE ADDED USING THIS QUESTION WILL ALSO BE REMOVED - PERMANENTLY.***

Custom Forms Manager

The Forms Manager screen is accessed from the PPS Tools Menu -> Custom Forms Manager option

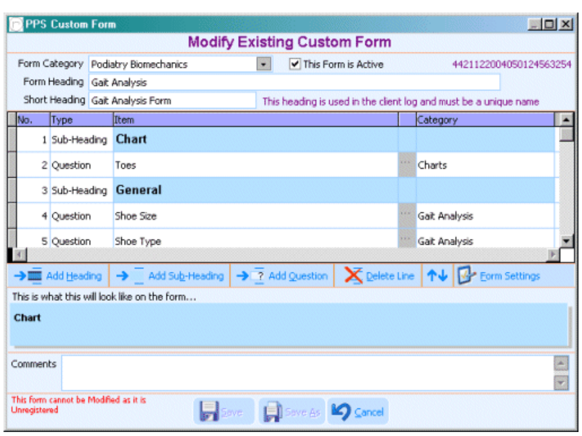


This screen shows your existing forms, listed in the categories they are filed in. Clicking on the + symbol or double clicking the category name will display the list of available forms within that category. The buttons at the bottom of this list enable you to Load forms, Register Forms, and delete forms.

*NOTE: If you select to delete a form, PPS first checks to make sure that the form can be deleted (you must have the correct authorisation to delete forms from your system administrator) and that no other users (on your network) are using the form. If a form has been completed and "signed off" for any client, the form cannot be deleted. If the form can be deleted and you confirm that you want to delete the form, then **ALL RECORDS THAT YOU HAVE ADDED USING THIS FORM WILL ALSO BE DELETED - PERMANENTLY.***

Custom Form Designer

The Custom Form designer screen is used to create new forms, and make changes to existing forms. The custom form designer screen is accessed from the Custom Forms Maintenance screen.



Form Category

You can organise your list of Custom Forms into different categories, depending upon the type of form it is. For example you can have one category for Treatments, one for Outcomes and so on. This enables means you have quick easy access to your forms, while setting them up and using them in the Consultation screen.

This Form is Active

This box needs to be ticked in order for the form to be available for use in the Consultation screen. You can leave this option un-ticked if you want to make further changes to your form later before making the form available for general use.

Along side the "Active" box, the unique form identity code (which is generated by PPS) is displayed to the right of the screen.

Form Heading

The form heading is your main name for the form. This is how the form will be identified in the Form Maintenance list and is also used to identify the form when used in the Consultation screen. This name must be unique amongst your collection of forms within the each category.

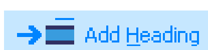
Short Heading

The form short heading is used to identify the form in the consultation screen, and must also be a unique name (among all forms in all categories).

Questions on the Form

The "grid" in the main portion of this screen, shows the list of questions, headings and subheadings that have been included on the form. The following options allow you to add, change or remove questions, headings and subheadings on the form.

Form Controls

Add Heading 

Use this button to add a main section heading to your form. Your form can include main headings and subheadings.

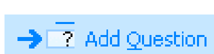
When you select this button, you can type your heading directly into the grid.

Add Subheading 

Use this button to add a subheading to your form. Sub headings are a useful way of dividing your form into sections, for example: Diagnosis, Treatment, etc. This can make your form easier to read. Your form can include both main headings and subheadings.

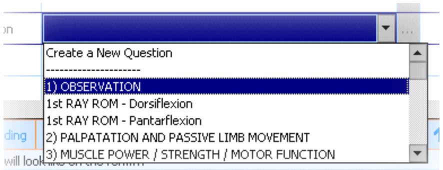
When you select this button, you can type your subheading directly into the grid.

Headings and subheadings can have their own background color, and use a larger font size than questions.

Add Question 

Use this button to add a new question to your form. Questions are always added to the bottom of the current list, and can be moved up and down the form as required. When adding a question you can select from your existing list of questions, or add a new one.

When you click this button, select your question from the drop down list directly on the grid.



Here, you can either select an existing question, or select the "Create a New Question" option to create a new one using the question designer screen. You can also filter your list of questions by category by first selecting the required category from the drop down list in the right hand column of the grid. The question list then only shows questions contained in that category.

Delete Line 

Use this button to remove a heading, subheading or question from the form.

Move Up / Down 

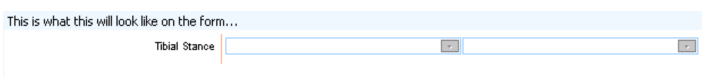
This button allows you to move your headings, subheadings and questions up or down the list to reorder them. You can use the normal left mouse button to move the item up or down one position, or use the right mouse button to move the selected item to the top/bottom of the form. This can be useful if you are adding a question to an existing form and you would like the question to be near the top of the form - simply add the question, use the right mouse button to move the question to the top of the form, then use the left mouse button to move the question down the form until the correct position is reached.

Form Settings 

This button displays the Form Settings screen which is used to control form colours, fonts, etc. for this form. See the Form Settings section of this help guide for more details.

Auto-Preview section

When you select an existing heading, subheading or question in the grid, the auto-preview section shows you what this will look like on the form.



You can quickly check the layout and style of the question to make sure that you have selected the correct one.

Comments

The comments section is your own notepad for comments on the form. The comments are not displayed anywhere else except on this screen.

Save/Cancel buttons

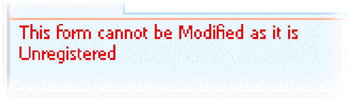
The <Save> button will save your latest changes to the form.

The <Save As> button will save another copy of the form - you will have to specify either a different form category or heading before you can use the Save As button.

Note: This is useful if you wish to create a new form based upon an existing one. It can be quicker to make a few changes to an existing form rather than build a new one from scratch.

The <Cancel> button will cancel any changes you have made and revert to the previously saved version of the form.

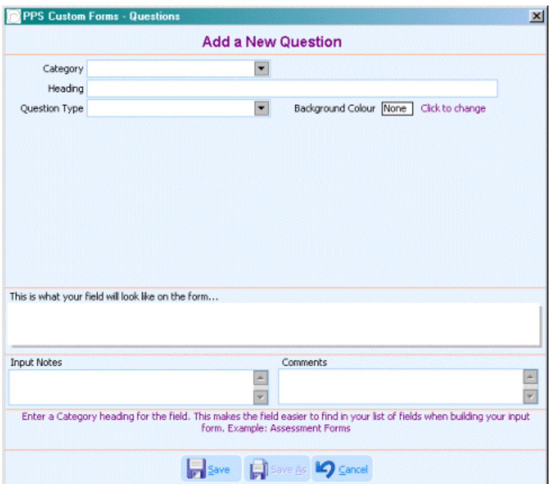
To the left of the Save button is an area that displays the current status of the form if changes are not allowed to the form.



The prompt will explain why the form cannot be saved.

Question Designer

The question designer screen is used to create new questions, and make changes to existing questions. The question designer screen is accessed from the Custom Forms Maintenance screen.



Shown here, when adding a new question, the screen is initially displayed showing a blank area in the middle. This space is used for your settings that are specific to the type of question you want to set up - See Question Types for more details.

Category

You can divide your list of questions into different categories, defendant upon the type of question it is. This gives quick easy access to your questions from the Form Maintenance screen.

Heading

This is the question heading that is used on the form - such as "what are the symptoms".

Question Type

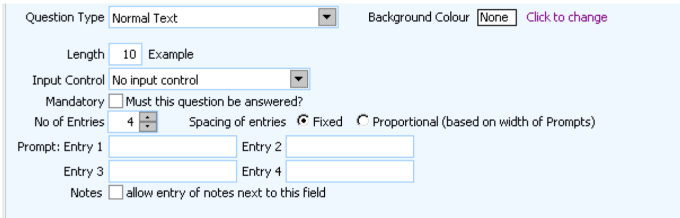
The question type determines how the answer will be entered. You can select from the following types:

- Normal text
- Numeric
- Date
- Multiple Choice List
- Check Box
- Radio Buttons
- Free Text input
- Answer headings
- Body Chart

See Question Types for an overview of the various question types you can use.

As you select each question type the middle portion of the screen changes to show the settings available for each question type.

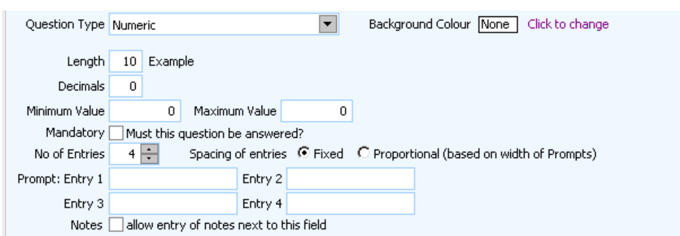
Normal text



The settings for this question type are:

- Length - the maximum number of characters that can be entered, for example **Neck Stretches** is 14 characters (including the space).
- Input control - select from either None, or Force Upper Case, where your answer will automatically by uppercase regardless of how it was typed in.
- Mandatory - if this box is ticked, then this question must be answered. An Asterisk (*) appears alongside the heading on the form to visually indicate questions that must be answered.
- No. of entries - up to 4. For example select 2 to record separate answers for "left" and "right".
- Spacing of entries - Fixed - the number of answers (except where the number of entries is 1) is spaced evenly across the screen. Proportional - the answers appear one after the other - depending upon the length of each prompt entry. Where several questions all have a "left" and "right" answer, fixed spacing is normally used so the answers line up in columns on the screen.
- Prompt - you can optionally include prompts for each of your answers. This could be "Left" and "Right" or perhaps an indication of the "units" required in the answer, for example cm, or °. If you have several questions that all use the same prompts, you can insert an "Answer Headings" question (see below) which acts as column headings for the following questions.
- Notes - If this box is ticked, you can also enter free text notes alongside your main answer.

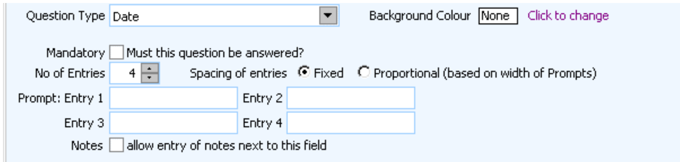
Numeric



The settings for this question type are:

- Length / Decimals - the maximum number of digits that can be entered including decimals for example **1234.56** is length 7 (including the point) and decimals 2.
- Minimum / Maximum value - You can optionally select a range of input, for example you can restrict the answer to a range between 1 and 10.
- Mandatory - if this box is ticked, then this question must be answered. An Asterisk (*) appears alongside the heading on the form to visually indicate questions that must be answered.
- No of entries - up to 4. For example select 2 to record separate answers for "left" and "right".
- Spacing of entries - Fixed - the number of answers (except where the number of entries is 1) is spaced evenly across the screen. Proportional - the answers appear one after the other - depending upon the length of each prompt entry. Where several questions all have a "left" and "right" answer, fixed spacing is normally used so the answers line up in columns on the screen.
- Prompt - you can optionally include prompts for each of your answers. This could be "Left" and "Right" or perhaps an indication of the "units" required in the answer, for example cm, or °. If you have several questions that all use the same prompts, you can insert an "Answer Headings" question (see below) which acts as column headings for the following questions.
- Notes - If this box is ticked, you can also enter free text notes alongside your main answer.

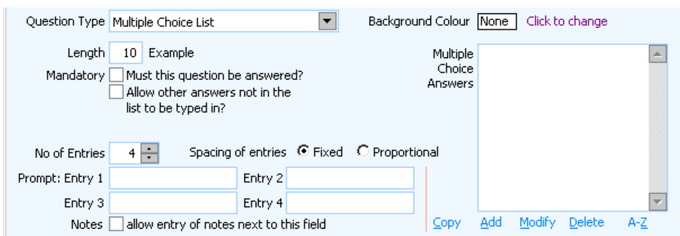
Date



The settings for this question type are:

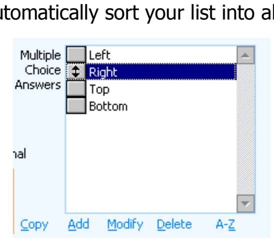
- Mandatory - if this box is ticked, then this question must be answered. An Asterisk (*) appears alongside the heading on the form to visually indicate questions that must be answered.
- No of entries - up to 4. For example select 2 to record separate answers for "Start" and "End".
- Spacing of entries - Fixed - the number of answers (except where the number of entries is 1) is spaced evenly across the screen. Proportional - the answers appear one after the other - depending upon the length of each prompt entry. Where several questions all have a "Start" and "End" answer, fixed spacing is normally used so the answers line up in columns on the screen.
- Prompt - you can optionally include prompts for each of your answers. This could be "Start" and "End". If you have several questions that all use the same prompts, you can insert an "Answer Headings" question (see below) which acts as column headings for the following questions.
- Notes - If this box is ticked, you can also enter free text notes alongside your main answer.

Multiple choice list

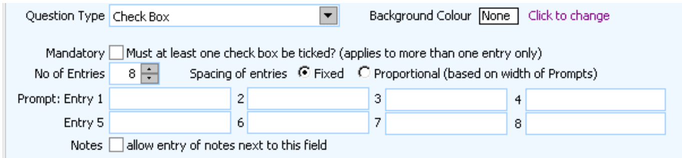


The settings for this question type are:

- Length - the maximum number of characters that can be entered, this will typically be the length of the longest answer in your list of answers.
- Mandatory - if this box is ticked, then this question must be answered. An Asterisk (*) appears alongside the heading on the form to visually indicate questions that must be answered.
- Allow other answers - tick this box if you want to either pick an answer from the list OR type in your own answer. Leaving this box un-ticked means you can only select from the answers in the list.
- No of entries - up to 4. For example select 2 to record separate answers for "left" and "right".
- Spacing of entries - Fixed - the number of answers (except where the number of entries is 1) is spaced evenly across the screen. Proportional - the answers appear one after the other - depending upon the length of each prompt entry. Where several questions all have a "left" and "right" answer, fixed spacing is normally used so the answers line up in columns on the screen.
- Prompt - you can optionally include prompts for each of your answers. This could be "Left" and "Right" or perhaps an indication of the "units" required in the answer, for example cm, or °. If you have several questions that all use the same prompts, you can insert an "Answer Headings" question (see below) which acts as column headings for the following questions.
- Notes - If this box is ticked, you can also enter free text notes alongside your main answer.
- Multiple Choice Answers - You can either type in your list of answers here, or use the "Copy" button to copy a set of answers from another question. To type in your answers, press the "Add" button. A small input box will appear at the bottom of the list for you to type in your first answer. Press Enter when you have typed in your answer and it will appear in the list. Use the "Modify" or "Delete" options to change your answers as required. You can use the A-Z option to automatically sort your list into alphabetical order. Or you can click and drag an item in the list to move its position.



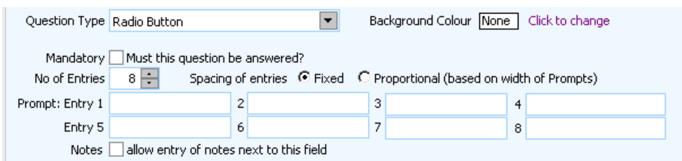
Check Box



The settings for this question type are:

- Mandatory - if this box is ticked, then at least one check box must be ticked. An Asterisk (*) appears alongside the heading on the form to visually indicate questions that must be answered.
- No of entries - up to 8. For example select 2 to record separate answers for "left" and "right".
- Spacing of entries - Fixed - the number of answers (except where the number of entries is 1) is spaced evenly across the screen. Proportional - the answers appear one after the other - depending upon the length of each prompt entry. Where several questions all have a "left" and "right" answer, fixed spacing is normally used so the answers line up nicely in columns on the screen.
- Prompt - you can optionally include prompts for each of your answers. This could be "Left" and "Right". If you have several questions that all use the same prompts, you can insert an "Answer Headings" question (see below) which acts as column headings for the following questions.
- Notes - If this box is ticked, you can also enter free text notes alongside your main answer.

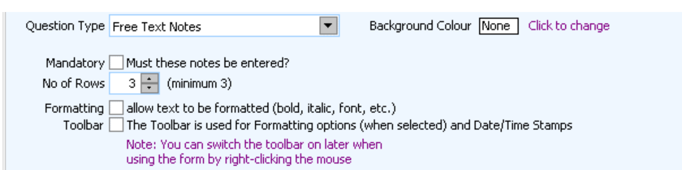
Radio Button



The settings for this question type are:

- Mandatory - if this box is ticked, then one answer option must be selected. An Asterisk (*) appears alongside the heading on the form to visually indicate questions that must be answered.
- No of entries - up to 8. For example select 2 to allow selection of "left" or "right".
- Spacing of entries - Fixed - the number of answers (except where the number of entries is 1) is spaced evenly across the screen. Proportional - the answers appear one after the other - depending upon the length of each prompt entry. Where several questions all have a "left" or "right" answer, fixed spacing is normally used so the answers line up in columns on the screen.
- Prompt - you can optionally include prompts for each of your answers. This could be "Left" and "Right". If you have several questions that all use the same prompts, you can insert an "Answer Headings" question (see below) which acts as column headings for the following questions.
- Notes - If this box is ticked, you can also enter free text notes alongside your main answer.

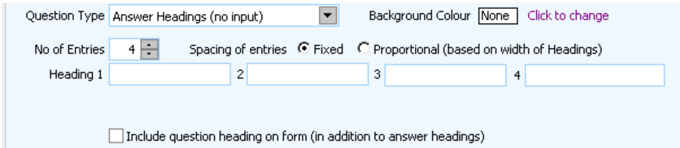
Free text input



The settings for this question type are:

- Mandatory - if this box is ticked, then this question must be answered. An Asterisk (*) appears alongside the heading on the form to visually indicate questions that must be answered.
- No of rows - minimum 3 maximum 25. This determines how many line of input appear on the screen. If more line are used while entering this answer, then the text within the box itself will scroll.
- Formatting - if you select this box, text can be formatted (change of font, bold, colour etc.).
- Toolbar - You can select to show a toolbar below the text typing area. The toolbar has text formatting options (if selected) and date/time stamps that can be used during input.

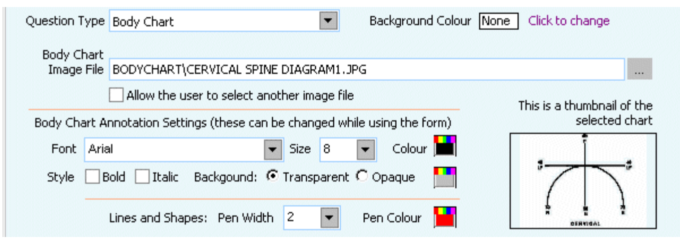
Answer Headings



The settings for this question type are:

- No of entries - up to 4. For example select 2 to show headings "left" and "right".
- Spacing of entries - Fixed - the number of answers (except where the number of entries is 1) is spaced evenly across the screen. Proportional - the answers appear one after the other - depending upon the length of each prompt entry. Where several questions all have a "left" and "right" answer, fixed spacing is normally used so the headings and answers line up in columns on the screen.
- Heading - Enter the Headings. This could be "Left" and "Right" for example.
- Include question heading - If this box is ticked, the name of this question (the Heading) will be displayed in the left column of the screen alongside all other question headings. Leave un-ticked and the actual answer/column headings only will be displayed.

Body Chart



The settings for this question type are:

- Body Chart Image File - Select the image file that will be used for the body chart. This can be one of the following supported image file types: BMP, JPG, TIF, DIB, CUR, ICO, ANI, GIF. You can either type in the name of the file or press the <...> button to select the file. If the image file is too large, PPS will offer to resize the image to a more suitable size. Your image files must be saved in a folder that is under the main PPS database folder on your system. The folder is called "StandardCharts". If you select an image file from outside this folder, PPS will copy the file into this folder for you.
- Allow selection of another image. This can be ticked to allow an alternative image to be used when the form is used. This could allow for a client-specific image to be selected when filling out the form - a digital image for example.
- Annotation Settings - you can select the default font, size and colour and style- these can be changed while using the form.
- Lines and Shapes - for boxes, crosses, circles and free drawing on the chart, you can select the pen width (in pixels) and colour. This can be changed while using the form.
- The image thumbnail shows a small preview of the image file you have selected.

Background colour

You can specify a background colour for a question which is different from the background colour selected for the main form. This is useful to draw attention to important questions on the form. Click the box to display the colour selection pop-up. Click on a colour from the list, or select "More Colours" to select from a full range of available colours.

Auto-Preview section

As you are setting up your question, the auto-preview section shows you approximately what the question will look like on the form.

Input Notes

The input notes are used during actual input of records to the form. As the user selects each question, the input notes are displayed in a highlighted bar along the bottom of the form.

Comments

These comments are for your own benefit and do not appear on the form that this question is used on.

As you move around the screen to set up each part of your question, help text is displayed in an area at the bottom of the screen (above the Save/Cancel buttons).

Save/Save As/Cancel buttons

If you are setting up a new question, use the <Save> button to save your question. If you are changing an existing question in order to create a new one, then use the <Save As> button to save another copy of the question. The new question can only be saved once you have changed either the Category or the Heading for the question.

Question Types

When setting up a question, you have to specify what type of question/answer it is. Below is a description of each question type. For all question types you can select the question background colour (this is in addition to selecting an overall form background colour). This is useful for highlighting individual questions on your form.

You can specify input notes for each question. These appear at the bottom of the form and can be used as a useful prompt for the user during input.

You can also add your own comments to each question. These do not appear on the form.

Normal Text

- Allows all characters and numbers to be entered.
- You can select the length of the entry so that you can restrict input to a limited number of characters.
- You can force the entry into upper case.
- You can specify that the question must be answered (mandatory).
- You can specify the number of entries (up to 4) - each entry can have its own prompt (useful to indicate left/right etc.)
- For more than one entry, you can specify either fixed or proportional spacing (fixed spacing will line up each answer into equal-spaced columns, proportional is based upon the length of each prompt and the length you have set for the answer).
- You can include free text notes alongside the answer (these are entered either to the right of the answer or on the next line)

Numeric

- Allows numbers only to be entered.
- You can select the length of the entry so that you can restrict input to a limited number of numbers, and you can specify the number of decimal places.
- You can specify a minimum and maximum value for the entry.
- You can specify that the question must be answered (mandatory).
- You can specify the number of entries (up to 4) - each entry can have its own prompt (useful to indicate left/right etc.)
- For more than one entry, you can specify either fixed or proportional spacing (fixed spacing will line up each answer into equal-spaced columns, proportional is based upon the length of each prompt and the length you have set for the answer).
- You can include free text notes alongside the answer (these are entered either to the right of the answer or on the next line)

Date

- Allows entry of dates only.
- You can specify that the date must be entered (mandatory).
- You can specify the number of entries (up to 4) - each entry can have its own prompt (useful to indicate first/last etc.)
- For more than one entry, you can specify either fixed or proportional spacing (fixed spacing will line up each answer into equal-spaced columns, proportional is based upon the length of each prompt).
- You can include free text notes alongside the answer (these are entered either to the right of the answer or on the next line)

Multiple Choice List

- Allows selection from a list of pre-selected values. The pre-selected values can be either typed in or copied from another similar question.
- You can select the length of the entry (will typically be the length of the longest answer in the list).
- You can specify that the question must be entered (mandatory).
- You can optionally allow an entry that is not in the pre-selected list to be entered.
- You can specify the number of entries (up to 4) - each entry can have its own prompt (useful to indicate left/right etc.)
- For more than one entry, you can specify either fixed or proportional spacing (fixed spacing will line up each answer into equal-spaced columns, proportional is based upon the length of each prompt and the length you have set for the answer).
- You can include free text notes alongside the answer (these are entered either to the right of the answer or on the next line)

Check Box

- You can specify that the box (or at least one) must be ticked.
- You can specify the number of entries (up to 8) - each entry can have its own prompt (useful to indicate sub-categories etc.)
- For more than one entry, you can specify either fixed or proportional spacing (fixed spacing will line up each box into equal-spaced columns, proportional is based upon the length of each prompt).
- You can include free text notes alongside the answer (these are entered either to the right of the answer or on the next line)

Radio Buttons

- You can specify that One of the buttons must be selected.
- You can specify the number of entries (up to 8) - each entry can have its own prompt (useful to indicate sub-categories etc.)
- For more than one entry, you can specify either fixed or proportional spacing (fixed spacing will line up each box into equal-spaced columns, proportional is based upon the length of each prompt).
- You can include free text notes alongside the answer (these are entered either to the right of the answer or on the next line)

Free Text Notes

- You can specify that the question must be answered (mandatory).
- You can specify the number of rows available on the screen (minimum is 3). If more lines are used whilst entering this answer then text within the box itself will scroll.
- You can select to allow the text to be formatted (bold/colours/font selection etc.) in the free text notes.
- You can show a toolbar beneath the notes - this is used for formatting and for date/time stamps to be inserted into the notes.

Answer Headings

- Answer headings can be used for column headings in a form subsection. Useful when used in conjunction with a series of check boxes or radio buttons for questionnaire style forms.
- You can specify the number of answer headings (up to 8)
- For more than one entry, you can specify either fixed or proportional spacing (fixed spacing will line up each box into equal columns, proportional is based upon the length of each prompt). Fixed spacing is normally used for column headings.
- You can select to also display the main Question heading in the left column of the form.

Body Chart

- Allows Selection of a Body Chart image file. This can be one of the following supported image file types: BMP, JPG, TIF, DIB, CUR, ICO, ANI, GIF.
- You can specify if an alternative chart image can be selected during input to the form.
- You can specify the default font, size, colour and style for annotations to the image (can be changed while using the form).
- You can specify default pen size and colour for annotation shapes/free drawing on the image (can be changed while using the form).

Creating a New Form

To create a new form you must have the Registered Version of PPS Custom Forms. New forms are created from the Custom Forms Maintenance screen.

From this screen, select the <New> button in the Forms section of the screen. This will show a new empty form with the heading "Add New Custom Form".

First select a form category (either select from the list of existing categories or type in a new one). The category helps you to organise your forms.

Select whether to make this form "Active". An active form is available to your systems users and appears in the Consultation screen screen. You can leave a form as not active if you want to make further changes before making the form available on the Consultation screen screen.

Enter a form heading. This is how the form will be known in your master list of forms (filed under your chosen category).

Enter a short name for the form. This is the name that is displayed in the Consultation screen.

You can now add questions, headings and subheadings to your form, and specify other settings such as colours, fonts, etc. See the Custom Form Designer section for more details.

Changing a Form

To change an existing form you must have the Registered Version of PPS Custom Forms. In addition, if you are not the original "author" of the form, you must be allowed to make changes to the form (this is one of the form options set by the author of the form), and the form must be registered (you have purchased a registration key for this form - see Form Registration for more details)

Forms can be changed from the Custom Forms Maintenance screen.

From this screen, select the form from the list of forms in the left side of the screen. The forms are organised into categories - to locate the form, first open the relevant Category folder that contains the form (by double clicking the category or by clicking the small + sign next to the category), then select a form to change. You can either click on the form in the list and click the <Modify> button, or double-click the form in the list.

The "Modify Existing Form" screen will then be displayed showing details of each of the questions and headings included on the form.

You can now add, change or remove questions, headings and subheadings to your form, and specify other settings such as colours, fonts, etc. See the Custom Form Designer section for more details.

Note: If you are not authorised to make any changes to the form for any reason, the <Save> button on the form designer screen will not be available and a message will appear (in red) next to the button explaining why you cannot save changes to the form.

Deleting a Form

You can delete a form using the Custom Forms Maintenance screen or the Custom Forms Manager screen.

First, select the form you wish to delete in the list, and press the <Delete> button.

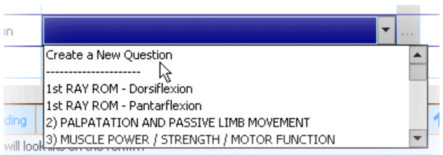
NOTE: If you select to delete a form, PPS first checks to make sure that the form can be deleted and that no other users (on your network) are using the form. If the form can be deleted and you confirm that you want to delete the form, then ***ALL RECORDS THAT YOU HAVE ADDED USING THIS FORM WILL ALSO BE DELETED - PERMANENTLY.***

Creating a New Question

Although you can create new questions whilst designing a new form, it is useful to have your common questions set up beforehand. This speeds up the process of creating the new form.

To create a new question , use the Custom Forms Maintenance screen. The right hand side of this screen displays your questions, listed in the Categories you have organised them in. Use the <New> button to show the Question Designer screen where you can add your new question.

To create a new question whilst creating/changing a form, this is done by selecting the first entry from the "drop down list" of existing questions - displayed as "Create a New Question". You can use this if the question you need to add to your form does not already exist in your list of questions.



When you select "Create a new question" from the list, the Question Designer screen will be displayed where you can add your new question. When you have created your question and return to the form, the question is automatically added to the form.

Changing a Question

Any changes to an existing question will be applied to ALL forms that the question is used on. In order to change a question you must, therefore have the authority to change the form.

Note: reasons why you are not allowed to change the form are: You do not have the "registered" version of PPS Custom Forms; You do have the registered version of PPS Custom Forms, and you have loaded a form and have not paid for the "registration key" for that form.

If you are not allowed to change a question, a message will appear on the question designer screen next to the <Save> button to indicate that the question cannot be changed.

To change an existing question , use the Custom Forms Maintenance screen. The right hand side of this screen displays your questions, listed in the Categories you have organised them in. Use the <Modify> button to show the Question Designer screen where you can change the details of the question.

Deleting a Question

You can delete a question using the Custom Forms Maintenance screen.

First, select the question you wish to delete in the list, and press the <Delete> button.

*NOTE: If you select to delete a question, PPS first checks to see which forms the question is used on, whether you are allowed to change this form, and that no other users (on your network) are using the form. If the question can be deleted and you confirm that you want to delete the question, then **ALL FORMS THAT USE THIS QUESTION WILL BE CHANGED - ENTRIES THAT YOU HAVE ADDED USING THIS QUESTION WILL ALSO BE REMOVED - PERMANENTLY.***

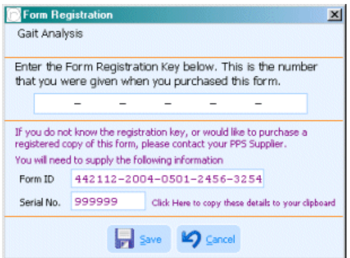
Form Registration

Any form that you have loaded (or a form that is supplied with PPS as standard) requires a Form Registration key. This must be obtained from your PPS supplier.

To register a form, use the Form Registration option of the Custom Forms Manager screen.

First, select a form from the list - the individual form icons indicate if the form is currently registered using either a green tick, or red cross.

Now press the <Form Registration> button.

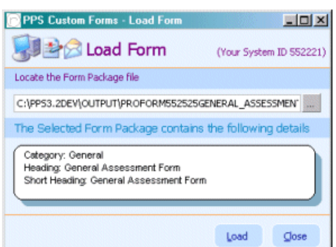


This displays the form registration screen. In order to obtain a form registration key from your PPS Supplier, you will need to provide the Form ID and the Serial number. Then in return you will be given a registration key that will "activate" the form and remove the record limit. Be careful when typing in the registration key, it contains both numbers and letters. Some letters such as I and O can be mistaken for numbers. If you receive the form registration key via e-mail, then you can copy and paste the form registration key into the space provided.

Loading a Form

To load a new form, you must have either been sent a form package file, or have downloaded a form from the PPS website.

To load a form, use the "Load Forms" button from the Custom Forms Manager screen.



A form is contained in a single Form Package ZIP file. The filename contains information about the form, and which system has prepared the form package.

Example Form Package File name: `proform999999general_assessment.zip`

The file name consists of four parts: 1) proform - this is standard to all form package files, 2) 999999 this is the serial number of the PPS system that has created the file (all files from Rushcliff or the PPS Web site will be 999999), 3) general_assessment - this is the form "short name" (an underscore character is used instead of a space), 4) .zip - this is the "file extension" and indicates that the file is a ZIP file.

To load a form, press the <...> button and locate the form package file. The screen then displays a summary of the form information. Press the <Load> button, and the form will be loaded.

When loading forms, PPS automatically determines if the form should be registered after loading it. This will depend upon whether or not another member of your PPS Family (or you) has designed the form.

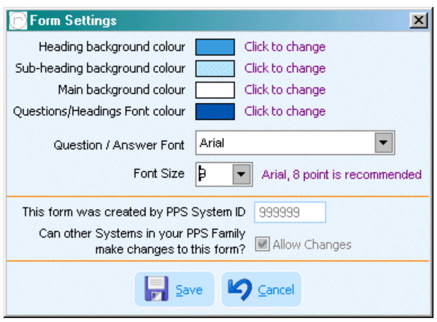
The following rules are used when loading forms

- If the form is one that you have designed, and you are loading the form from another member of your PPS family, then when you load the form it will automatically be registered on your system.
- If the form is one where have purchased an individual registration key (i.e. not one that you have designed), then the form will NOT be registered when you load it - you must enter the registration key separately.

Registering a form that you have loaded.

To register a form that you have loaded and remove the 5 record limit, you must obtain a valid registration key for the form. You must contact your PPS supplier to obtain this registration key. See Form Registration for more details.

Form Settings



The form settings screen is used to specify various settings that will apply to the form you are currently designing. This screen is accessed using the <Form Settings> button on the Custom Form Designer screen.

Heading background colour - Click into the coloured box to change the background colour used for headings on the form.

Subheading background colour - Click into the coloured box to change the background colour used for subheadings on the form.

Main background colour - Click into the coloured box to change the background colour used for all the question headings. Individual questions can have their own background colour that is used in preference to this colour on the form.

Question / Answer font - select the font that will be used on the form. The default is Arial.

Font size - Select the font size that will be used on the form. The subheadings will automatically use next font size up from this, and a size up again for the main headings. The headings and subheading are always displayed using the "bold" font setting.

System ID - This indicates the ID of the system that created the form. This will be your own PPS System id if you created the form. Forms supplied by Rushcliff have the serial number 999999.

Allow Changes - the Author of a form (*you* if you have designed the form) can select if other PPS Systems in your PPS family can make changes to this form. If not then only the Author of the form can make changes. This setting is also used where forms supplied by Rushcliff (authors of PPS) are sponsored by third parties, or societies and it is required that the form is used "as supplied" and no changes are made.